SERVING THE TOTAL FOODSERVICE INDUSTRY

JULY 8, 1992

RESTAURANTS & INSTITUTIONS

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THE 400: FINANCIALS

OVERVIEW 14
THE RANKING. From $20 billion McDonald's to $32 million Northwest Airlines. . . . 32
THE RANKING BY SEGMENT. Burgers lead at $36.4 billion; retail brings up the rear at $1.1 billion. 52

THE 400: STRATEGIES

Top menus and marketing trends from leading foodservice companies.

BURGERS. Big players heat up competition with bold promos and menu items. . . . 62
CONTRACTORS. Branding peaks while wellness, display cooking gain ground. . . . 71
PIZZA/ITALIAN. Leaders and upstarts add multiple units, new concepts. 78
LODGING. Tourism and occupancy declines spur switch to casual concepts. 85
FAMILY DINING. Menus and programs that cater to kids please parents, too. 93
CHICKEN. Skin-free chicken and nonchicken items join menus at chicken chains. . . 101
SWEETS. Chains hope salads, baked goods and health food will increase sales. . . 111
DINNER HOUSES. Conspicuous spending is out, but diners will pay for value. . . . 116
STEAK/BARBECUE. Upscale menu items and little couponing fatten profits. 125
MILITARY. Defense cuts set the stage for food courts, automation and more. . . 131
MEXICAN. Value pricing and mainstream competition boost sales. 137
SANDWICHES. Chains target budget buyers and quality seekers. 145
SEAFOOD. Dinners, combos, grilling and broiling provide competitive edge. . . 151
TRANSPORTATION. Foodservice aims to please all—from business travelers to the health-conscious. 159
CONVENIENCE STORES. Customer-friendly redesigns help meet evolving needs. . . . 161
CAFETERIAS. Meal deals, ad campaigns and new designs keep patrons interested. . 165
HEALTH CARE. Chains shuffle assets in quest for profits. 171
GOVERNMENT INSTITUTIONS. Shrinking budgets severely restrain the fastest-growing market. 175
EDUCATION. Bigger, more interesting menus attract more customers and increase revenues. 179
RECREATION. Gulf War and recession hurt, but fun reigns again in '92. 185
RETAIL. Price/value, light-healthful and kids' stuff set tempo for budget and high-end retailers. 191
THE 400: ALPHABETICAL INDEX 196

DEPARTMENTS

Briefings 6
Viewpoint 11
Product Catalog 201
Classified Ads 211
Advertisers Index 218
Product Retrieval 218
Photo Credits 218
Reader Service Card 219

ABOUT THE COVER

Our 400 companies grossed a rock-solid $139.7 billion in 1991. Details, page 14.

THE BIGGEST BRANDS IN FOODSERVICE

The industry's major players lay the groundwork for greater growth.

400 *Restaurants and Institutions'* 400, the broadest ranking of foodservice brands in existence today, generated record sales of almost $140 billion in 1991.

Issues of value and efficiency topped the agenda of the organizations in this year's 400 survey. In many cases, tough times have forced operators closer to their customers, spawning innovations and cost savings that appear to be helping the industry lead the way out of the recession.

From 1990 to 1991, the sales of the top 400 advanced 4.4%, slightly outpacing the industry's 4.2% gain.

On a same-brand sales basis, organizations in the third quarter of the survey fared best. Led by top growth chains like **Checkers Drive-In** (107%), **California Pizza Kitchen** (52.5%), **I Can't Believe It's Yogurt** (38.5%) and **The Spaghetti Warehouse** (35%), as well as rapidly expanding institutional feeders including the **Texas Department of Criminal Justice** (65.6%), concepts with sales in the $50 million to $90 million range grew 9.3% in 1991.

The top 100 brands also showed solid growth. Comparing systems that appeared in both this year's and last year's survey, sales for the first hundred brands increased more than 5.9% for 1991. Among the top 20, **Taco Bell** vaulted from No. 10 to No. 8 on a 16.7% sales increase; **Little Caesars** rode a 23.2% gain four spots to No. 14; and **Subway**

continued on page 20

Dining rooms such as the Maile Restaurant at the Kahala Hilton will benefit from a rebound in travel this summer.

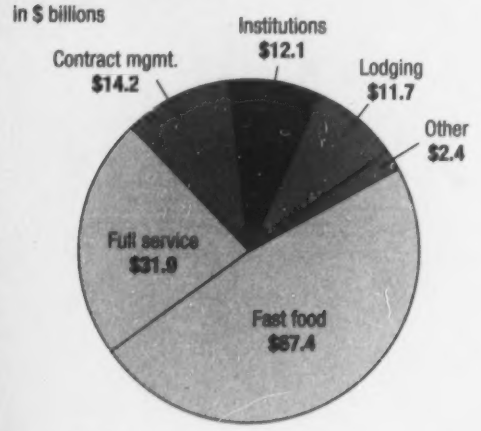
Bob Evans' new Cantina Del Río, opened in April in Columbus, Ohio, is one of many spinoffs from this year's 400.

400 company Walt Disney opened Euro Disney near Paris in April. The park drew more than 1.5 million in its first seven weeks.

Healthful foods, like Wendy's new salads, are headlining nationwide.

R&I 400 SALES BY SEGMENT

Fast food accounted for about 48% of total 400 sales in 1991. Full service was 23%.



Source: 1992 R&I 400

R&I 400 AND THE INDUSTRY

The U.S. foodservice industry totaled $247.9 billion in 1991. The 400 was 56% as large.

Source: 1992 R&I 400

Chains are banking on top culinary talent to give them an edge in quality.

continued from page 14

used a 27.3% surge to climb to No. 20 from No. 23. Perennial powerhouse **McDonald's**, with systemwide sales of almost $20 billion, tightened its grip on the No. 1 spot in the survey with a 6.2% rise.

On the whole, the second hundred and the last hundred brands in the survey seem to have struggled most during the recession. Despite strong performances from chains like **Old Country Buffet** (42.6%), and **Rally's** (25%), as well as health-care standout **Daughters of Charity Health Systems** (36.2%), the second hundred managed only a 3% increase.

Meanwhile, the last 100 brands—those with sales of less than $50 million—slipped about 1% from 1990 to 1991. Because percentage changes are calculated only for brands that have been on the survey for at least one year, however, the growth figure for the lower 100 does not reflect the addition of small aggressive newcomers like **Pudgie's Famous Chicken, Morton's of Chicago, Longhorn Steaks, Bain's Deli** and **Mark Pi's**.

McDonald's now double-checks drive-thru orders.

TOP 20 GROWTH LEADERS

SALES

1.	Checkers Drive-In	107.0%
2.	Texas Dept. of Criminal Justice	65.6
3.	Calif. Pizza Kitchen	52.5
4.	Houston Independent School District	45.0
5.	Old Country Buffet	42.6
6.	Stuart Anderson's	39.2
7.	I Can't Believe It's Yogurt	38.5
8.	Trans/Pacific Rests.	37.8
9.	Chili's Grill & Bar	37.3
10.	Daughters of Charity Health Systems	36.2
11.	The Spaghetti Warehouse	35.0
12.	Nordstrom	34.8
13.	Häagen-Dazs	34.1
14.	Cracker Barrel	31.9
15.	Cinnabon	30.4
16.	Hillsborough County (Fla.) School Board	28.0
17.	Guckenheimer	27.7
18.	Nathan's Famous	27.3
19.	Subway	27.3
20.	Golden Corral	26.9

UNITS

1.	Daughters of Charity Health Systems	70.0%
2.	I Can't Believe It's Yogurt	69.8
3.	Checkers Drive-In	67.1
4.	Resorts Intl.	65.2
5.	Omni Hotels	40.4
6.	C.A. Muer	40.0
7.	Cracker Barrel	35.2
8.	Nordstrom	34.8
9.	Trans/Pacific Rests.	34.3
10.	Hooters	33.3
11.	Royal Carribbean Cruise Line	33.3
12.	The Spaghetti Warehouse	29.4
13.	N.J. Dept. of Human Services	28.6
14.	Ark Restaurants	26.3
15.	Dunkin' Donuts	26.1
16.	Rally's Hamburgers	26.1
17.	Wyndham Hotels & Resorts	25.7
18.	The Cooker	25.0
19.	Au Bon Pain	24.4
20.	Nathan's Famous	23.4

An overriding theme expressed by operators in this year's 400 was the desire to move away from the deep discounts of the past several years. As a result, they have worked to emphasize improved quality and service as points of differentiation.

Following are some of the top trends and issues emerging from this year's 400.

WANTED: HIRED GUNS

Fine dining's loss has appeared to be the rest of the industry's gain, as chain after chain has tapped top chefs to bring a gourmet touch to their menus. **Schlotzsky's** new head of concept development, Chef Michael Dyer, has redesigned the sandwich chain's menu and repositioned the restaurants as New Orleans-style delis. **Shoney's Inc.** in March brought in Executive Chef Tom White to head corporate concept development and last November hired Culinary Institute of America-trained Luke Belsito as executive chef of the **Shoney's** family-dining chain. **Bertucci's Brick Oven Pizza** in April tapped Italian chef Rosario Del Nero as corporate chef to develop new pizza and pasta dishes. **Furr's** cafeterias recently put Certified Master Chef Michael Robbins on its payroll. And **Old Spaghetti Factory** late last year hired Roland Henin, coach of Culinary Team USA, as executive chef.

continued on page 24

continued from page 20

New restaurant concepts spotlight regional and ethnic cooking.

NEW CONCEPTS

To showcase Henin's talents, OSF turned him loose to develop a new concept, **Cody's**, which the chain hopes to develop into a new growth vehicle. A Mediterranean restaurant featuring a display rotisserie, Cody's is only one of a host of new concepts from this year's 400. **Pizza Hut**, for example, opened its first **Fastino's**, which serves fast-food Italian fare, in Wichita, Kan. **General Mills Restaurants**, operator of **The Olive Garden** and **Red Lobster**, opened its second **China Coast** in the Orlando, Fla., area. The company hopes the full-service Chinese concept will grow to be its next monster chain. **Baskin-Robbins** is testing **Bon Doux**, a French-bakery concept, in West Hollywood, Calif. **Bresler's Ice Cream & Yogurt** is franchising its new **Bresler's Cafe** salad and sandwich concept in the Chicago area. **Bob Evans** unveiled its first **Cantina Del Rio** casual Mexican restaurant in April.

Meanwhile, a joint venture between **Chili's** parent company **Brinker International** and **Philip Romano**, creator of **Fuddruckers** and **Romano's Macaroni Grill**, has produced **Nachomama**, a casual upscale Mexican restaurant. **Chart House** recently unveiled two new concepts, **Beaches** and **Mango's**, in southern California. **Beaches** is a salad, taco and burger concept, while **Mango's** specializes in steak and features a South Pacific theme. **Subway**'s new test concept **Q Burger** is a gourmet burger restaurant using freshness as a niche. **Restaurants Unlimited** raised the curtain on **Pantana**, a pizza, pasta and salad concept with a wood-burning display oven, in November.

Dairy Queen recently opened a unit in China.

TOP 10 FULL SERVICE*

	CHECK AVERAGES All-day, per-person average		UNIT SALES Average unit volumes, same store	
1.	Morton's	$51.00	Claim Jumper	$4.8MM
2.	Ruth's Chris	36.00	Houston's	4.7
3.	Benihana	23.26	Restaurants Unltd.	3.5
4.	Schwartz Bros.	18.00	T.G.I. Friday's	3.4
5.	TS Restaurants	17.00	The Cooker	3.2
6.	Stuart Anderson	16.00	RA Theme Rests.	3.1
7.	Lettuce Entertain You	15.65	Trader Vic's	3.1
8.	Bombay Bicycle Club	13.37	Calif. Pizza Kitchen	3.0
9.	L&N Seafood	13.05	Morton's	3.0
10.	Claim Jumper	12.00	Red Lobster	3.0

TOP 10 QUICK SERVICE*

	CHECK AVERAGES		UNIT SALES	
1.	Pudgie's	$11.58	McDonald's	$1.7MM
2.	Brown's Chicken	8.00	Chuck E. Cheese	1.2
3.	El Pollo Loco	6.87	White Castle	1.2
4.	Chuck E. Cheese	6.25	Carl's Jr.	1.0
5.	Lamp Post Pizza	6.00	Jack In The Box	1.0
6.	Skipper's	5.75	Hardee's	940K
7.	Miami Subs	5.50	Bojangles'	922
8.	Mr. Hero	5.00	Krystal	918
9.	Bain's Deli	4.75	Miami Subs	900
10.	Manchu Wok	4.50	Checkers	896

*Includes supplied numbers only

FRICTION! FRICTION!

While many operators are looking for growth concepts, even more are searching for new ways to distribute the products they've got.

Use of kiosks or carts to develop nontraditional sites has exploded in recent years, and with it, franchisees' concerns about competing with their own franchisors for sales.

Leading the charge into carts are the PepsiCo chains **Taco Bell** and **Pizza Hut**. In February, PepsiCo bought a stake in Carts of Colorado, a Denver-based cart manufacturer.

About 300 Taco Bell franchisees organized earlier this year to protect themselves from cannibalization

continued on page 28

Smaller, cheaper buildings are allowing chains to enter new markets.

continued from page 24

by the carts. Similarly, a small but vocal group of **Little Caesars** franchisees have made headlines recently by opposing the deal their franchisor has made to add some-400 Little Caesars Pizza Station units to **K mart** stores.

The battles have begun moving into statehouses and courts. Legislation protecting franchisees' trading areas and other rights is pending in several states. **McDonald's** is currently in court in Iowa testing just such a law.

The solution more franchised chains are discovering: Make development of nontraditional sites an opportunity for franchisees.

HOT FROM THE OVEN

According to this year's 400, companies industrywide are racing to add in-store bakeries.

Many, like **Ryan's Family Steak Houses** and **Shoney's**, are reporting tremendous results. Shoney's says its new pie shops have the potential to return $2.30 for every $1 invested. And Ryan's bake shops, which cost about $47,000 to install, typically pay for themselves in less than a year.

But given the ease with which other operators can add bakeries of their own, some have begun to question the longevity of the trend. Those jumping on the bakery bandwagon include: **The Wood Co., Golden Corral, Quincy's, Perkins** and **Spaghetti Warehouse**. Even **Lettuce Entertain You Enterprises**, the Chicago-based independent restaurant group, has gotten into the act with its new **Maggiano's/Corner Bakery.**

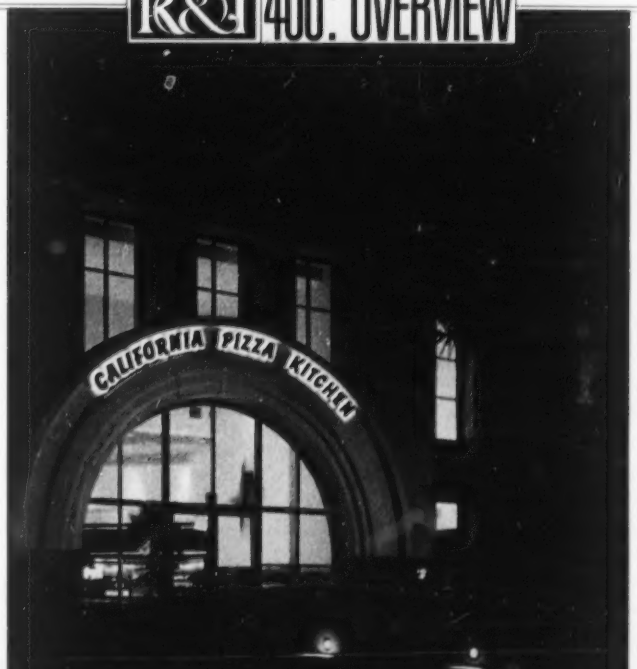
SHRINKING BUILDINGS

If bakeries are aimed at adding to top lines, then cost cuts are designed to bring more of those dollars to the bottom line.

McDonald's, for example, has created a new 2,000-square-foot prototype that is half the size of and 30% cheaper to build than its old models. The chain says the new buildings will allow it to enter 1,700 new domestic markets that previously had been considered unviable. Others aiming cheaper downsized units at small markets include **Red Lobster, The Spaghetti Warehouse, T.G.I. Friday's** and **Morrison's**.

Meanwhile, new fast-growing chains—like **Outback Steakhouses** and **Miami Subs**—keep investments down by expanding largely through conversions.

—Rajan Chaudhry



PepsiCo now owns 50% of California Pizza Kitchen.

RULES OF THE RANKING

Restaurants & Institutions' 400 measures systemwide sales of prepared foods and beverages for brands in 21 segments of the hospitality industry. The survey defines brands as foodservice concepts operating under the same name. (Exceptions are made in the case of independent restaurant groups, which operate multiple concepts.) In most cases, data is supplied by the organizations themselves. Where companies do not provide sales, or if numbers supplied are deemed inaccurate, *R&I* develops estimates, often with the aid of outside analysts and consultants.

MATTERS OF ACCOUNTING

□ Sales and unit figures comprise all food and beverage outlets for each brand or system—company owned and franchised, domestic and international.

□ Foreign-owned organizations are included in the rankings only if their U.S. operations have sales sufficient to make the 400 cutoff: this year, $32 million.

□ *R&I* applies a multiplier of 2.8 to the food and beverage purchases reported by institutional operations to determine a commercial sales equivalent. The multiplier is unchanged from last year.

TIE BREAKERS

In the event of a tie, companies that provide actual numbers precede those that supply estimates in the rankings. Both rank above *R&I* estimates. As a last resort, tied companies are listed alphabetically.

R&I 400: RANKING

Rank '92	('91)	Concept	Segment	'91 sales in $ millions	% chg. sales	'91 units	% chg. units	FY ends	Ownership
1	(1)	McDonald's	FF burgers	19,928.20	6.2	12,418	5.2	12/91	Public/NYSE
2	(2)	Burger King	FF burgers	6,200.00	1.6	6,489	3.4	10/91	Grand Metropolitan PLC
3	(3)	KFC	FF chicken	6,200.00	7.4	8,480	3.6	12/91	PepsiCo
4	(4)	Pizza Hut	FS pizza	5,300.00	8.2	9,000	11.9	12/91	PepsiCo
5	(5)	Hardee's	FF burgers	3,431.00**	A	3,727	2.9	12/91	Imasco Ltd.
6	(6)	Wendy's	FF burgers	3,223.60	5.0	3,804	2.1	12/91	Public/NYSE
7	(7)	ARA Services	Contract mgmt.	2,830.00	4.8	2,720	4.6	12/91	Private
8	(10)	Taco Bell	FF Mexican	2,800.00	16.7	3,670	12.1	12/91	PepsiCo
9	(A)	Marriott Management Services	Contract mgmt.	2,500.00*	A	2,400	.5	12/91	Marriott Corp.
10	(9)	Domino's Pizza	FF pizza	2,400.00	−9.4	5,500	2.3	12/91	Private
11	(11)	Dairy Queen	FF sweets	2,352.40**	1.6	5,329	2.3	11/91	Intl. Dairy Queen
12	(A)	Gardner Merchant Food Services	Contract mgmt.	2,158.60**	A	6,733	A	1/92	Forte PLC
13	(A)	7-Eleven	C-stores	1,996.90**	A	13,486	A	12/91	The Southland Corp.
14	(18)	Little Caesars	FF pizza	1,725.00	23.2	3,650	15.0	12/91	Private
15	(A)	Red Lobster	FS seafood	1,600.00**	A	610**	A	12/91	General Mills
16	(15)	Denny's	Family dining	1,591.30	4.1	1,391	2.4	12/91	TW Services
17	(14)	Sheraton	Lodging	1,543.50	−3.5	1,468	−8.3	12/91	ITT Corp.
18	(A)	Canteen	Contract mgmt.	1,460.00	A	1,579	−3.2	12/91	TW Services
19	(16)	Arby's	FF sandwiches	1,450.00	1.4	2,500	3.3	12/91	DWG Corp.
20	(23)	Subway	FF sandwiches	1,400.00	27.3	6,106	13.5	12/91	Doctors Assoc.
21	(17)	U.S. Army Center of Excellence, Subsistence	Military	1,400.00†*	−2.0	800	−19.6	9/91	—
22	(A)	Hyatt Hotels	Lodging	1,167.50**	A	597**	A	12/91	Private
23	(22)	Hilton Hotels	Lodging	1,100.00	−2.0	1,200	0.0	12/91	Public/NYSE
24	(26)	Shoney's	Family dining	1,099.00	10.6	775	5.4	10/91	Shoney's Inc.
25	(20)	Marriott Lodging	Lodging	1,083.00	−20.6	766	0.0	12/91	Marriott Corp.
26	(25)	Big Boy	Family dining	1,076.40**	7.6	946	−.4	12/91	Elias Bros. Restaurants
27	(A)	Caterair International	Transportation	1,049.00	A	117	A	12/91	Private
28	(27)	U.S. Navy Food Service Systems	Military	1,045.20†	9.5	609	−10.4	9/91	—
29	(30)	Dunkin' Donuts	FF sweets	990.80**	8.5	2,203	26.1	2/92	Allied-Lyons PLC
30	(29)	Sizzler	Steakhouses/BBQ	983.60*	7.3	636*	A	12/91	Public/NYSE
31	(28)	Jack In The Box	FF burgers	978.00	3.7	1,099	5.2	9/91	Foodmaker
32	(32)	Holiday Inn Hotels	Lodging	965.60**	11.1	3,300*	22.2	12/91	Bass PLC
33	(24)	Service America	Contract mgmt.	915.00*	−16.8	1,100	−33.3	12/91	Private
34	(37)	Baskin-Robbins	FF sweets	829.70	23.6	3,533	6.5	2/92	Allied-Lyons PLC
35	(39)	The Olive Garden	FS Italian	808.00*	25.3	320	18.5	5/92	General Mills
36	(34)	Choice Hotels	Lodging	800.00	6.7	2,295	A	12/91	Manor Care
37	(36)	Ponderosa	Steakhouses/BBQ	744.10**	6.5	809	6.4	12/91	Metromedia Corp.
38	(41)	Morrison's Custom Management	Contract mgmt.	618.00*	2.7	708	2.2	6/92	Morrison Inc.
39	(42)	Carl's Jr.	FF burgers	614.00	6.2	630	9.0	1/92	Public/OTC
40	(44)	Westin Hotels & Resorts	Lodging	580.00	10.5	475	1.5	12/91	Aoki Corp.
41	(A)	Army & Air Force Exchange Service	Military	574.20	A	2,060	−21.8	12/91	—
42	(49)	T.G.I. Friday's	Dinner houses	570.00	12.5	199	19.2	12/91	Carlson Cos.
43	(A)	Long John Silver's Seafood Shoppes	FF seafood	565.00*	A	1,460	.3	6/92	Jerrico
44	(A)	United Airlines	Transportation	550.00	A	17	0.0	12/91	UAL
45	(43)	Popeyes Famous Fried Chicken & Biscuits	FF chicken	540.20	−1.2	808	2.8	12/91	A. Copeland Ent.
46	(62)	Chili's Grill & Bar	Dinner houses	531.90*	37.3	264	7.3	6/92	Brinker Intl.
47	(50)	Walt Disney World Co.	Recreation	531.00	4.9	250	A	12/91	Public/NYSE
48	(45)	Friendly's	Family dining	530.00	1.9	780	−2.4	12/91	Tenn. Restaurant Co.
49	(56)	Sonic Drive-Ins	FF burgers	518.00	13.9	1,112	6.6	8/91	Public/OTC
50	(52)	Ogden Services	Contract mgmt.	510.00	9.7	82	9.3	12/91	Public/NYSE

*Company estimate; **R&I estimate; †commercial equiv.; (A) No comparison possible with previous-year data; (R) Based on revised 1990 figures; (S) 48% of sales from vending

R&I 400: RANKING

Rank '92	('91)	Concept	Segment	'91 sales in $ millions	% chg. sales	'91 units	% chg. units	FY ends	Ownership
51	(48)	Church's Chicken	FF chicken	506.60	−1.4	1,136	−2.3	12/91	A. Copeland Ent.
52	(51)	Perkins Family Restaurants	Family dining	505.00	7.2	407	3.6	12/91	Tenn. Restaurant Co.
53	(A)	Dobbs International Services	Transportation	500.00	A	52	0.0	12/91	The Dial Corp.
54	(47)	Inter-Continental Hotels	Lodging	499.00	−2.9	425	0.0	12/91	Private
55	(63)	Sky Chefs	Transportation	470.00	3.8R	36	0.0R	12/91	Onex Foodservice
56	(53)	Bennigan's	Dinner houses	463.00**	.4	225**	.9	12/91	S&A Restaurant Corp.
57	(55)	Chi-Chi's	FS Mexican	456.30	−.6	237	6.8	9/91	Foodmaker
58	(68)	Golden Corral	Steakhouses/BBQ	449.00	26.9	440	8.9	12/91	Private
59	(65)	Radisson Hotels	Lodging	425.00	11.8	430	3.6	12/91	Carlson Cos.
60	(58)	Captain D's	FF seafood	420.80	2.1	636	1.1	10/91	Shoney's Inc.
61	(64)	International House of Pancakes	Family dining	413.60	7.7	499	1.8	12/91	Public/OTC
62	(57)	Western Sizzlin'	Steakhouses/BBQ	400.00	−10.1	372	−15.5	12/91	Private
63	(46)	Bonanza	Steakhouses/BBQ	389.20**	−24.4	365	−24.4	12/91	Metromedia
64	(67)	Bob Evans Restaurants	Family dining	381.50**	6.6	261	8.3	12/91	Bob Evans Farms
65	(61)	El Torito	FS Mexican	375.00*	−5.5	175	−2.8	12/91	Restaurant Ent. Group
66	(66)	Seiler's/FDI	Contract mgmt.	375.00**	−.3	477	0.0	12/91	Sodexho
67	(74)	New York City Board of Education	Education	363.90†*	13.0	1,289	2.1	6/92	—
68	(71)	Ryan's Family Steak Houses	Steakhouses/BBQ	355.10	7.3	177	11.3	12/91	Public/OTC
69	(81)	Ramada Hotels	Lodging	348.00**	17.9	580**	20.8	12/91	HFS
70	(83)	Wal-Mart Stores	Retail	331.60**	14.1	1,403	14.2	1/92	Public/NYSE
71	(76)	Luby's Cafeterias	Cafeterias	330.40	3.3	154	9.2	12/91	Public/NYSE
72	(72)	K mart	Retail	326.00	0.0	1,982	10.1	12/91	Public/NYSE
73	(82)	Chick-fil-A	FF chicken	324.60	10.5	460	4.3	12/91	Private
74	(69)	TCBY	FF sweets	321.00	−6.4	1,850	.2	11/91	Public/NYSE
75	(78)	Round Table Pizza	FF pizza	320.00	2.9	575	2.1	12/91	Round Table Fran. Corp.
76	(A)	Whataburger	FF burgers	318.40**	A	475	A	12/91	Private
77	(A)	Waffle House	Family dining	312.70**	A	784	A	5/92	Private
78	(A)	Days Inns of America	Lodging	312.50**	A	625**	A	12/91	HFS
79	(91)	ServiceMaster	Contract mgmt.	310.00**	17.4	305**	0.0	12/91	Private
80	(A)	Morrison's Cafeterias	Cafeterias	306.40*	A	165	A	6/92	Morrison Inc.
81	(59)	U.S.A.F. Morale, Welfare, Rec. & Service	Military	300.70†	−26.3	590	−.8	9/91	—
82	(75)	White Castle	FF burgers	300.00	3.1R	257	−1.5	12/91	Private
83	(103)	Applebee's Neighborhood Grill & Bar	Dinner houses	289.60	24.1	191	19.4	12/91	Public/OTC
84	(85)	The Ground Round	Dinner houses	288.60	1.6	281	1.0	12/91	Public/AMEX
85	(92)	California Dept. of Corrections	Institutions	288.40†	9.6	245	2.9	12/91	—
86	(87)	Quincy's Family Steakhouses	Steakhouses/BBQ	283.30	.6	216	1.9	12/91	TW Services
87	(73)	U.S. Marine Corps	Military	280.00†	−13.1	96	−7.7	9/91	—
88	(95)	Bakers Square	Family dining	279.00	11.6	179	8.5	10/91	Vicorp Restaurants
89	(89)	Piccadilly Cafeterias	Cafeterias	275.00*	−1.8	141	−1.4	6/92	Public/OTC
90	(96)	Sbarro	FF Italian	273.30	9.8	530	16.0	12/91	Public/AMEX
91	(90)	Dept. of Veterans Affairs	Military	269.10†	1.2	172	0.0	9/91	—
92	(127)	Stuart Anderson's Restaurants	Steakhouses/BBQ	258.80**	39.2	87	1.2	12/91	Amer. Restaurant Group
93	(A)	U.S. Air Force Clubs Branch	Military	252.40	A	225	−18.8	9/91	—
94	(100)	United Health	Health care	252.00†	5.9	154	2.0	12/91	Private
95	(79)	Restaura Dining Services	Contract mgmt.	250.00	−16.7	320	6.7	12/91	The Dial Corp.
96	(99)	Village Inn	Family dining	245.70	2.3	227	−.4	10/91	Vicorp Restaurants
97	(113)	Los Angeles Unified School District	Education	245.60†*	17.7	586	−14.3	6/92	—
98	(128)	Cracker Barrel Old Country Store	Family dining	242.60	31.9	119	35.2	8/91	Public/OTC
99	(112)	Ruby Tuesday	Dinner houses	241.50*	15.6	156	19.1	6/92	Morrison Inc.
100	(102)	Tony Roma's—A Place for Ribs	Steakhouses/BBQ	241.00	3.0	147	4.3	2/92	Private

*Company estimate; **R&I estimate; †commercial equiv.; (A) No comparison possible with previous-year data; (R) Based on revised 1990 figures

continued on page 38

continued from page 33

R&I 400: RANKING

Rank '92 ('91)	Concept	Segment	'91 sales in $ millions	% chg. sales	'91 units	% chg. units	FY ends	Ownership
101 (93)	Marie Callender Pie Shops	Family dining	240.80	−7.4	163	1.9	12/91	Wilshire Restaurants
102 (98)	Beverly Enterprises	Health care	239.50†**	−1.1	853**	−1.0	12/91	Public/NYSE
103 (A)	Roy Rogers	FF sandwiches	236.60**	A	338	A	12/91	Imasco Ltd.
104 (104)	Godfather's Pizza	FS pizza	233.50	2.0	511	−2.7	12/91	Private
105 (130)	Shakey's	FS pizza	225.00	25.0	395	5.6	12/91	Inno-Pacific Holdings
106 (105)	Stouffer Hotels	Lodging	225.00**	−1.1	113**	.9	12/91	Nestlé USA
107 (A)	U.S. Navy Officer's and Enlisted Club System	Military	224.80	A	338	−6.9	9/91	—
108 (121)	The Wood Co.	Contract mgmt.	224.30	13.1	305	5.2	12/91	The Albert Abela Corp.
109 (A)	National Medical Enterprises	Health care	224.00†**	A	533	A	12/91	Private
110 (132)	Rally's Hamburgers	FF burgers	221.10	25.0	333	26.1	12/91	Public/OTC
111 (77)	Rax	FF sandwiches	220.80	−30.8	355	−21.8	7/91	Public/OTC
112 (108)	A&W Restaurants	FF sandwiches	217.00	0.0	722	−3.9	12/91	Taubman Investment Co.
113 (A)	Furr's Cafeterias	Cafeterias	216.00**	A	120	A	12/91	Public/NYSE
114 (109)	Steak & Ale	Steakhouses/BBQ	215.00**	.5	158**	0.0	12/91	S&A Restaurant Corp.
115 (A)	Circle K	C-stores	213.30**	A	5,509	A	12/91	Public/NYSE
116 (A)	Red Lion	Lodging	213.00	A	135	3.1	12/91	Public/AMEX
117 (120)	Krystal	FF burgers	211.00	6.0	250	5.9	12/91	Public/OTC
118 (107)	Four Seasons Hotels & Resorts	Lodging	209.00	−6.7	92**	0.0	12/91	Four Seasons
119 (122)	Ritz-Carlton Hotels	Lodging	207.10**	6.0	80	5.3	12/91	Private
120 (153)	Old Country Buffet	Cafeterias	207.00**	42.6	114	21.3	1/92	Public/OTC
121 (165)	Bally Casino Resorts	Lodging	204.00**	2.0	33	0.0	12/91	Bally Mfg.
122 (A)	Dobbs Houses	Family dining	200.00*	A	436	A	12/91	The Dial Corp.
123 (A)	U.S. Army Community & Family Support	Military	198.30	A	823	A	9/91	—
124 (114)	Houlihan's	Dinner houses	198.20	−3.8	70	−7.9	12/91	Gilbert/Robinson
125 (119)	dôka	Contract mgmt.	195.00	−2.5	486	2.5	12/91	DAKA Intl.
126 (110)	Harry M. Stevens	Contract mgmt.	190.00	−9.5	28	−3.4	12/91	Private
127 (123)	El Pollo Loco	FF chicken	185.90	−4.6	211	−15.6	12/91	TW Services
128 (136)	Sportservice	Contract mgmt.	185.00	9.5	175	2.9	12/91	Delaware North Cos.
129 (131)	Country Kitchen	Family dining	182.40	2.7	232	−5.7	12/91	Carlson Cos.
130 (135)	Fuddruckers	FS burgers	177.70	3.9	134	2.3	12/91	DAKA Intl.
131 (A)	Del Taco	FF Mexican	177.00**	A	279	A	12/91	Private
132 (140)	Pizza Inns	FS pizza	176.00*	6.7	415	−2.4	7/92	Private
133 (129)	Grandy's	FF chicken	175.90	−3.9	199	−1.0	12/91	Amer. Restaurant Group
134 (141)	Braum's Ice Cream & Dairy Stores	FF sweets	175.30**	7.0	252	6.8	12/91	Private
135 (151)	Red Robin	Dinner houses	173.20	18.6	81	19.1	12/91	Skylark Co. Ltd.
136 (A)	Navy Exchange Service Command	Military	168.00†	A	466	A	1/92	—
137 (124)	Wyatt's Cafeterias	Cafeterias	166.00	−14.4	94	−25.4	12/91	Private
138 (134)	Concession Air	Contract mgmt.	165.00	−5.2	39	2.6	12/91	Delaware North Cos.
139 (116)	Embassy Suites	Lodging	165.00	−17.5	103	−1.9	12/91	Promus Cos.
140 (150)	Club Corp. of America	Contract mgmt.	160.00	8.8	185	2.2	12/91	Private
141 (A)	Hard Rock Cafe	Dinner houses	157.80**	A	28	A	12/91	Private[T]
142 (162)	Federal Bureau of Prisons	Institutions	155.10†	13.3	67	3.1	9/91	—
143 (A)	Chuck E. Cheese	FS pizza	155.00**	A	187	A	12/91	ShowBiz Pizza Time
144 (144)	Mrs. Fields	FF sweets	155.00**	.2	600**	0.0	12/91	Private
145 (155)	Chart House	Dinner houses	150.00	4.7	67	3.1	12/91	Public/NYSE
146 (181)	Daughters of Charity Health Systems	Health care	146.40†*	36.2	68	70.0	6/92	Private
147 (142)	Universal Ogden	Contract mgmt.	144.00	−10.0	480	−4.0	12/91	Private
148 (154)	Lee's Famous Recipe Chicken	FF chicken	143.80	−.8	275	−2.1	10/91	Shoney's Inc.
149 (157)	Hospital Corp. of America	Health care	142.80†**	3.0	128**	0.0	12/91	Private
150 (137)	Specialty Restaurants	Dinner houses	141.00	−15.6	72	0.0	7/91	Private

*Company estimate; **R&I estimate; †commercial equiv.; (A) No comparison possible with previous-year data; (T) Ownership split between Rank Leisure USA and Hard Rock Cafe America

R&I 400: RANKING

Rank '92 ('91)	Concept	Segment	'91 sales in $ millions	% chg. sales	'91 units	% chg. units	FY ends	Ownership
151 (126)	Carvel Ice Cream Bakery	FF sweets	140.00	−26.3	800	−8.5	12/91	Investcorp
152 (139)	PeFolks	Family dining	140.00	−15.2	135	−1.5	9/91	Public/OTC
153 (149)	Woolworth	Retail	140.00	−5.7	583	−19.6	12/91	Public/NYSE
154 (A)	Wawa	C-stores	139.90	A	491	A	12/91	Private
155 (166)	Taco John's	FF Mexican	137.00*	2.9	435	−2.2	12/91	Private
156 (158)	Doubletree Hotels	Lodging	137.00**	−1.2	100**	0.0	12/91	Canadian Pacific
157 (164)	Carrow's	Family dining	136.00**	.8	108	0.0	12/91	Restaurant Ent. Group
158 (160)	Chicago Public Schools	Education	135.80†*	−1.6	600	3.3	6/92	—
159 (173)	Pizzeria Uno Restaurant & Bar	FS pizza	135.40	12.6	96	12.9	9/91	Public/AMEX
160 (172)	Carnival Cruise Lines	Recreation	135.40†**	12.5	65	12.1	12/91	Public/AMEX
161 (163)	Caesar's World	Lodging	135.00	−.7	34	0.0	12/91	Private
162 (191)	Häagen-Dazs	FF sweets	135.00	34.1	365	−3.2	12/91	Grand Metropolitan PLC
163 (A)	Trans World Airlines	Transportation	132.50	A	3	A	12/91	Public/NYSE
164 (118)	Harrah's Casino Hotels	Lodging	131.60	−2.4	38	18.0	12/91	Public/NYSE
165 (156)	Papa Gino's	FS pizza	131.50	−4.7	218	0.0	9/91	Private
166 (168)	Tastee-Freez	FF sweets	130.00	0.0	360	−1.1	12/91	DeNovo Corp.
167 (185)	Royal Caribbean Cruise Line	Recreation	129.40†	24.9	72**	33.3	12/91	Private
168 (170)	Bojangles' Chicken & Biscuits	FF chicken	128.00	5.8	160	3.9	12/91	BJ Acquisition Corp.
169 (177)	J.B.'s Restaurants	Dinner houses	127.30	10.9	139	4.5	12/91	Public/OTC
170 (171)	Lyon's Restaurants	Family dining	125.10*	3.8	82	9.3	6/92	Private
171 (174)	Omni Hotels	Lodging	124.50	4.4	125	40.4	12/91	Wharf Holdings Ltd.
172 (175)	Blimpie Subs & Salads	FF sandwiches	122.20	4.4	500	22.2	12/91	Astor Restaurant Group
173 (156)	Western Sizzlin Family Steakhouses	Steakhouses/BBQ	121.40	−14.7	123	−15.2	2/92	WSMP
174 (178)	Circus Circus Enterprises	Lodging	121.30**	8.0	37	0.0	12/91	Public/NYSE
175 (176)	Wienerschnitzel	FF sandwiches	119.70	4.2	288	0.0	12/91	Galardi Group
176 (183)	Florida Dept. of Corrections	Institutions	119.00†	11.8	132	3.9	12/91	—
177 (A)	Black-eyed Pea	Dinner houses	117.70**	A	98	A	3/92	Prufrock Restaurants
178 (179)	Kettle Restaurants	Family dining	116.00	7.0	163	−2.4	10/91	Private
179 (161)	Mazzio's	FS pizza	114.80	−16.2	243	−8.3	12/91	Private
180 (203)	New York State Dept. Correctional Services	Institutions	113.70†	23.6	68	1.5	3/92	—
181 (167)	Mr. Gatti's	FF pizza	113.40**	−13.0	252	−16.0	12/91	LDB Corp.
182 (188)	Humana	Health care	112.00†	9.9	81	0.0	12/91	Public/NYSE
183 (184)	El Chico	FS Mexican	110.80**	4.1	84	1.2	12/91	Southwest Cafes
184 (A)	Casey's General Store	C-stores	110.20*	A	799	1.7	4/92	Public/OTC
185 (A)	U.S.M.C. Morale, Welfare & Rec. Supp.	Military	109.00	A	300	−17.6	12/91	—
186 (193)	Busch Entertainment	Recreation	108.00	8.0	110**	0.0	12/91	Anheuser-Busch
187 (146)	Mister Donut	FF sweets	107.10**	−28.6	360	−28.6	2/92	Allied-Lyons PLC
188 (180)	Steak 'n Shake	Family dining	106.00	−1.5	119	1.7	12/91	Consolidated Products
189 (—)	Daylight Donut Shops	FF sweets	105.40	—	527	—	12/91	Private
190 (209)	Dade County (Fla.) Schools	Education	104.60†*	16.7	302	.7	7/92	—
191 (200)	Houston's Restaurants	Dinner houses	102.90	10.6	23	15.0	12/91	Private
192 (189)	Skipper's	FF seafood	100.50	−.7	216	.5	12/91	National Pizza Co.
193 (A)	New Jersey Dept. of Corrections	Institutions	100.30†	A	15	A	12/91	—
194 (212)	Hooters Restaurants	Dinner houses	100.00	17.6	84	33.3	12/91	Private
195 (192)	California Dept. of Rehabilitation	Institutions	100.00†	0.0	290	0.0	12/91	—
196 (A)	Taco Time	FF Mexican	100.00*	A	287	A	9/91	Private
197 (—)	Cineplex Odeon	Recreation	99.20**	—	415	—	12/91	Public/NYSE
198 (196)	Professional Food-Service Management	Contract mgmt.	97.50	2.4	133	3.1	8/91	Private
199 (221)	Eat'n Park	Family dining	97.00	21.3	54	3.8	12/91	Private
200 (204)	Lettuce Entertain You Enterprises	Dinner houses	95.50	4.9	20	−3.4	12/91	Private

*Company estimate; **R&I estimate; †commercial equiv.; (A) No comparison possible with previous-year data; (R) Based on revised 1990 figures

continued on page 44

continued from page 41

R&I 400: RANKING

Rank '92 ('91)	Concept	Segment	'91 sales in $ millions	% chg. sales	'91 units	% chg. units	FY ends	Ownership
201 (197)	Fosters Freeze	FF sweets	95.40	.4	172	-4.4	12/91	Private
202 (206)	Dayton Hudson Department Store Co.	Retail	95.00	5.6	62	A	12/91	Public/NYSE
203 (211)	Garcia's Mexican Restaurants	FS Mexican	95.00	8.6	51	-3.8	12/91	Famous Restaurants
204 (195)	Brown's Chicken & Pasta	FF chicken	94.00	-2.1	148	-1.4	10/91	Private
205 (210)	HDS Services	Contract mgmt.	93.00	4.8	125	2.5	12/91	TrettCo
206 (—)	Outback Steakhouse	Steakhouses/BBQ	91.00	—	49	—	12/91	Public/OTC
207 (207)	Wometco Food Services	Contract mgmt.	91.00*	1.1	962	.2	6/92	Private
208 (202)	Golden Nugget Casinos	Lodging	90.40	-2.0	18	0.0	12/91	Mirage Resorts
209 (250)	I Can't Believe It's Yogurt	FF sweets	90.00	38.5	730	69.8	12/91	Brice Foods
210 (201)	Guest Services	Contract mgmt.	90.00*	-3.2	128	0.0	12/91	Private
211 (222)	Howard Johnson	Family dining	89.20	11.5	185	5.0	12/91	Franchise Assoc.
212 (255)	Trans/Pacific Restaurants	Dinner houses	88.20	37.8	47	34.3	3/92	Private
213 (205)	Benihana	Dinner houses	88.00	-2.2	49	0.0	3/92	Public/OTC
214 (217)	Winchell's Donut House	FF sweets	85.00	5.1	385	0.0	12/91	Shato Holdings Ltd.
215 (—)	D'Angelo Sandwich Shops	FF sandwiches	85.00*	—	160	—	12/91	Private
216 (215)	Princess Hotels International	Lodging	84.30**	0.0	34	0.0	9/91	Lonrho PLC
217 (213)	King's Table Buffets	Cafeterias	84.20	-.9	60	-24.1	12/91	Private
218 (219)	Six Flags	Recreation	83.00**	3.1	350**	2.9	12/91	Private
219 (234)	Acapulco Restaurants	FS Mexican	82.60	11.6	48	17.1	9/91	Restaurant Assoc.
220 (233)	Valley Innovative Mgmt.	Contract mgmt.	82.50	10.9	145	5.8	12/91	Private
221 (220)	Sonny's Real Pit Bar-B-Q	Steakhouses/BBQ	82.00	2.1	80	14.3	12/91	Private
222 (208)	Orange Julius	FF sweets	82.00**	-8.7	560	-8.8	11/91	Intl. Dairy Queen
223 (226)	Michigan Dept. of Corrections	Institutions	81.90†	5.5	68	-1.4	9/91	—
224 (240)	Au Bon Pain	FF sandwiches	80.00	14.0	107	24.4	12/91	Public/OTC
225 (246)	Target Stores	Retail	80.00	19.4	450	7.1	12/91	Dayton Hudson
226 (232)	Pancho's Mexican Buffet	FS Mexican	78.10	4.8	70	4.5	9/91	Public/OTC
227 (244)	AMTRAK	Transportation	77.70	12.8	300	0.0	9/91	Private
228 (235)	Bill Knapp's	Dinner houses	76.80**	4.1	68**	11.5	12/91	Private
229 (223)	Health Trust	Health care	76.70†**	-3.5	82	-3.5	12/91	Private
230 (—)	Darryl's	Dinner houses	76.50	—	30	—	12/91	Gilbert/Robinson
231 (148)	Brown Derby	Dinner houses	76.10**	-49.1	27	-49.1	12/91	Private
232 (256)	Damon's	Steakhouses/BBQ	75.00	21.0	45	12.5	12/91	Private
233 (A)	Emro Marketing	C-stores	75.00*	A	1,000*	A	12/91	Marathon Oil Co.
234 (252)	K&W Cafeterias	Cafeterias	75.00*	15.4	28	16.7	6/92	Private
235 (—)	Manchu Wok	FF Chinese	75.00*	—	234	—	5/92	Scott's Hospitality
236 (182)	Trusthouse Forte Hotels	Lodging	75.00*	-29.8	125	.8	2/92	Forte PLC
237 (238)	Manor Health Care	Health care	73.80†*	2.9	166	-1.2	5/92	Manor Care
238 (375)	Checkers Drive-In	FF burgers	73.50	107.0	117	67.1	12/91	Public/OTC
239 (253)	The Boyd Group	Lodging	73.20	13.3	29	3.6	6/91	Private
240 (218)	Huddle House	Family dining	73.00	-9.3	201	1.5	4/92	Private
241 (224)	Mrs. Winner's Chicken & Biscuits	FF chicken	73.00*	-7.6	115	-.9	5/92	Mrs. Winner's L.P.
242 (216)	New York State Office of Mental Health	Institutions	72.90†	-13.2	31	-3.1	12/91	—
243 (237)	Wyndham Hotels & Resorts	Lodging	72.60	0.0	44	25.7	12/91	Private
244 (225)	L&N Seafood	FS seafood	71.58*	-9.3	40	17.6	6/92	Morrison Inc.
245 (254)	Sirloin Stockade Restaurant	Steakhouses/BBQ	71.00	10.9	76	2.7	12/91	Private
246 (A)	ShowBiz Pizza	FS pizza	70.40**	A	85	A	12/91	ShowBiz Pizza Time
247 (—)	Chevys Mexican Restaurants	FS Mexican	70.00	—	34	—	12/91	Private
248 (—)	All Seasons Services	Contract mgmt.	70.00*	—	102	—	12/91	Private
249 (339)	Nathan's Famous	FF sandwiches	70.00*	27.3[R]	79	23.4	3/92	Private
250 (245)	Restaurants Unlimited	Dinner houses	69.90	2.0	22	4.8	12/91	Private

*Company estimate; **R&I estimate; †commercial equiv.; (A) No comparison possible with previous year data; (R) Based on revised 1990 figures

R&I 400: RANKING

Rank '92 ('91)	Concept	Segment	'91 sales in $ millions	% chg. sales	'91 units	% chg. units	FY ends	Ownership
251 (282)	Ruth's Chris Steak House	Steakhouses/BBQ	69.00	15.0	31	6.9	12/91	Private
252 (248)	Togo's Eatery	FF sandwiches	69.00	4.5	145	9.0	12/91	M.T.C. Mgmt.
253 (298)	Nordstrom	Retail	67.00**	34.8	93	34.8	12/91	Public/OTC
254 (249)	Pennsylvania Dept. of Corrections	Institutions	66.40†	.9	25	-21.9	12/91	—
255 (345)	Texas Dept. of Criminal Justice	Institutions	66.40†*	65.6	62	1.6	8/92	—
256 (251)	Sanese Services	Contract mgmt.	65.00[U]	0.0	75	7.1[R]	12/91	Private
257 (281)	New York City Health & Hospitals	Health care	64.80†**	17.8	20	17.6	6/92	—
258 (260)	Holland America Line	Recreation	64.40†	7.0	52	0.0	12/91	Carnival Cruise Line
259 (247)	Fairmont Hotels	Lodging	64.10	-3.3	21	-8.7	12/91	Private
260 (320)	Houston Independent School District	Education	64.10†*	45.0	232	1.3	8/92	—
261 (259)	Taco Bueno	FF Mexican	63.00*	4.0	110	0.0	3/92	Casa Bonita
262 (272)	Hungry Howie's Pizza & Subs	FF pizza	62.00	8.8	205	15.8	12/91	Private
263 (292)	Old Spaghetti Factory	FS Italian	62.00	21.6	37	2.8	12/91	OSF Intl.
264 (263)	The Original Cookie Co.	FF sweets	62.00	3.3	282	4.8	12/91	Private
265 (352)	California Pizza Kitchen	FS pizza	61.00*	52.5	23	21.1	6/92	Private
266 (266)	Peter Piper	FF pizza	60.30**	2.9	119	2.6	12/91	Private
267 (311)	Cinnabon World Famous Cinnamon Rolls	FF sweets	60.00	30.4	165	11.5	12/91	Restaurants Unlimited
268 (308)	Guckenheimer	Contract mgmt.	60.00	27.7	122	4.3	12/91	Private
269 (271)	Schlotzsky's	FF sandwiches	60.00	5.3	245	2.9	12/91	Private
270 (A)	Veterans Canteen Service	Military	60.00	A	172	A	9/91	—
271 (264)	Great American Chocolate Chip Cookie Co.	FF sweets	60.00**	.2	300**	A	12/91	Private
272 (257)	Registry Hotel	Lodging	60.00**	-2.3	15**	0.0	12/91	Private
273 (288)	Nutrition Management Services	Contract mgmt.	58.00	0.0	100	0.0	6/92	Private
274 (239)	New York State Office of Mental Retardation	Institutions	57.70†	-17.9	20	0.0	3/92	—
275 (A)	O'Charley's Restaurant & Lounge	Dinner houses	57.50	A	36	A	12/91	Public/OTC
276 (287)	Trader Vic's	Dinner houses	57.50	10.6	19	-5.0	12/91	Private
277 (289)	Evangelical Lutheran Good Samaritan Soc.	Health care	57.50†**	12.3	235	12.4	12/91	Private
278 (—)	Mountain Jack's	Steakhouses/BBQ	57.30**	—	33	—	12/91	Kyotaru Intl.
279 (276)	RA Theme Restaurants	Dinner houses	56.50	2.4	17	-5.6	9/91	Restaurant Assoc.
280 (293)	Philadelphia School District	Education	56.10†*	10.7	272	3.8	6/92	—
281 (—)	Levy Specialty Concessions	Contract mgmt.	55.50	—	10	—	12/91	The Levy Organization
282 (283)	Ohio Dept. of Rehabilitation & Correction	Institutions	55.10†**	3.6	22	0.0	6/92	—
283 (270)	Adam's Mark Hotels	Lodging	55.00	-3.5	33	0.0	12/91	HBE Corp.
284 (394)	RA Restaurant Services	Contract mgmt.	55.00	12.2[R]	18	-5.3	12/91	Restaurant Assoc.
285 (279)	Shari's Restaurants	Family dining	55.00	0.0	54	3.8	12/91	Private
286 (313)	Hawaii Statewide School System	Education	54.60†*	19.0	230	0.0	6/92	—
287 (282)	A&W Hot Dogs & More	FF sandwiches	54.00*	-.9	264	-2.2	5/92	Private
288 (354)	The Spaghetti Warehouse	FS Italian	54.00*	35.0	22	29.4	6/92	Public/NYSE
289 (284)	C.A. Muer	FS seafood	53.00	0.0	21	40.0	9/91	Private
290 (302)	Hamburger Hamlets	FS burgers	53.00	9.5	25	8.7	12/91	Public/OTC
291 (236)	Resorts International	Lodging	52.40	-27.2	38	65.2	12/91	Private
292 (—)	Hungry Hunter	Steakhouses/BBQ	52.10**	—	30	—	12/91	Kyotaru Intl.
293 (300)	Southern Foodservice Mgmt.	Contract mgmt.	51.50	5.1	101	17.4	9/91	Private
294 (280)	Soup Exchange	Family dining	51.20**	-6.9	32**	-8.6	12/91	Soup & Salad Systems
295 (357)	Ark Restaurants	Dinner houses	51.10	6.5[R]	24	26.3[R]	9/91	Public/AMEX
296 (333)	Lackmann Food Service	Contract mgmt.	51.00	21.1	51	6.3	6/92	Private
297 (278)	Red Onion	FS Mexican	51.00*	-7.3	16	0.0	6/92	Private
298 (294)	California Dept. of Developmental Services	Institutions	50.40†**	0.0	11	0.0	12/91	—
299 (337)	David's Cookies	FF sweets	50.20**	20.4	265**	11.3	12/91	Specialty Foods Mgmt.
300 (—)	Bill Miller Barbeque	Steakhouses/BBQ	50.00*	—	47	—	12/91	Private

*Company estimate; **R&I estimate; †commercial equiv.; (A) No comparison possible with previous-year data; (R) Based on revised 1990 figures; (U) 72% of sales from vending

continued on page 48

continued from page 45

R&I 400: RANKING

Rank '92 ('91)	Concept	Segment	'91 sales in $ millions	% chg. sales	'91 units	% chg. units	FY ends	Ownership
301 (303)	Entertainment One	Dinner houses	50.00*	4.2	20	0.0	12/91	Private
302 (331)	Maid-Rite	FF sandwiches	50.00*	17.6	170	0.0	12/91	Private
303 (—)	Homestyle Family Buffet	Cafeterias	49.40	—	33	—	12/91	Public/OTC
304 (312)	Life Care Center	Health care	49.10**	6.7	130**	4.8	12/91	Private
305 (A)	Legal Sea Foods	FS seafood	49.00*	A	8	A	12/91	Private
306 (297)	Olga's Kitchen	Family dining	49.00**	−2.0	52**	−1.9	12/91	Private
307 (314)	Health Care & Retirement Corp.	Health care	48.40†	6.1	135	0.0	12/91	Private
308 (299)	Showboat	Lodging	46.80	−5.1	13	8.3	12/91	Public/NYSE
309 (309)	MCL Cafeterias	Cafeterias	46.80**	0.0	28	3.7	1/92	Private
310 (274)	Pennsylvania Dept. of Public Welfare	Institutions	46.60†*	−16.8	29	−9.4	6/92	—
311 (347)	Everything Yogurt & Salad Cafés	FF sweets	46.00	15.0	325	3.2	12/91	Private
312 (325)	LaRosa's Pizzerias	FS pizza	46.00	7.0	46	−6.1	12/91	Private
313 (359)	Broward County (Fla.) School Board	Education	45.70†*	18.4	175	0.0	6/92	—
314 (A)	Levy Restaurants	Dinner houses	45.50	A	35	A	12/91	The Levy Organization
315 (360)	Texas Health Enterprises	Health care	45.50†**	18.2	130*	18.2	12/91	Private
316 (A)	Peasant Restaurants	Dinner houses	45.00	A	19	A	12/91	Quantum Restaurants
317 (317)	Doral Hotels & Resorts	Lodging	45.00**	0.0	16**	0.0	12/91	Carol Mgmt.
318 (A)	Bombay Bicycle Club	Dinner houses	44.80	A	33	A	9/91	Associated Hosts
319 (295)	U.S. Army Medical Dept.	Military	44.80†	−10.8	50	0.0	9/91	—
320 (230)	Swensen's Ice Cream	Family dining	44.50**	−40.7	138	−46.1	12/91	Steve's Ice Cream
321 (322)	Jerry's Subs & Pizza	FF sandwiches	44.30	1.8	78	4.0	12/91	Private
322 (324)	Bresler's Ice Cream & Yogurt	FF sweets	44.00	2.3	300	0.0	12/91	Private
323 (330)	North Carolina Dept. of Corrections	Institutions	43.90†*	3.1	91	0.0	7/91	—
324 (273)	McCrory Stores	Retail	43.70**	−23.1	230**	−22.3	12/91	Private
325 (A)	Magic Pan	Dinner houses	43.60**	A	28	A	12/91	Bay Bottlers Ltd.
326 (332)	Leiserv	Recreation	43.50	3.1	126	0.0	12/91	Brunswick Corp.
327 (328)	Opryland Hotels	Lodging	43.50	1.2	3	0.0	12/91	Public/NYSE
328 (A)	Sir Pizza	FF pizza	43.20*	A	71	A	12/91	Private
329 (329)	Dallas Independent School District	Education	43.10†	.7	192	−.5	6/92	--
330 (—)	Longhorn Steaks	Steakhouses/BBQ	43.10**	—	29	—	12/91	Public/OTC
331 (326)	Mr. Hero	FF sandwiches	43.00	0.0	120	−4.0	12/91	Restaurant Developers
332 (389)	Hillsborough County (Fla.) School Board	Education	43.00†*	28.0	159	6.7	6/92	—
333 (350)	Spectrum Restaurants	Dinner houses	43.00**	7.5	16	6.7	12/91	Amer. Restaurant Group
334 (361)	In-N-Out Burgers	FF burgers	42.60**	11.8	71	10.9	12/91	Private
335 (304)	American Medical International	Health care	42.20†**	−11.7	38	−11.6	12/91	Public/NYSE
336 (306)	Aztar	Lodging	42.00	−11.4	38	0.0	1/92	Public/OTC
337 (343)	Casa Olé Restaurants & Cantinas	FS Mexican	42.00	3.7	36	0.0	12/91	Private
338 (335)	National Healthcorp	Health care	42.00†	0.0	87	16.0	12/91	Private
339 (384)	The New York Restaurant Group	Dinner houses	42.00*	22.8	7	16.7	12/91	Private
340 (A)	Charlie Brown's	Dinner houses	41.80	A	26	A	9/91	Restaurant Assoc.
341 (346)	Arctic Circle	FF burgers	41.50	3.8	100	−5.7	12/91	Private
342 (307)	Bobby McGee's	Dinner houses	41.00	−12.8	13	−23.5	12/91	Private
343 (—)	Central Park USA	FF burgers	41.00	—	72	—	12/91	Private
344 (291)	Mr. Steak	Steakhouses/BBQ	41.00	−19.6	51	−40.0	12/91	Jamco Ltd.
345 (378)	The Pasta House	FS Italian	41.00	17.1	26	0.0	12/91	Private
346 (364)	King's Family Restaurants	Family dining	41.00*	7.9	24	9.1	6/92	King's Country Shops
347 (349)	Sonesta Hotels	Lodging	41.00**	2.5	30	0.0	12/91	Private
348 (—)	Morton's of Chicago Steakhouses	Steakhouses/BBQ	40.50	—	17	—	12/91	Quantum Restaurants
349 (368)	Mountain Mike's Pizza	FF pizza	40.00	8.1	74	5.7	12/91	Private
350 (—)	Pudgie's Famous Chicken	FF chicken	40.00	—	131	—	12/91	Private

*Company estimate. **R&I estimate. †commercial equiv. (A) No comparison possible with previous-year data. (R) Based on revised 1990 figures

R&I 400: RANKING

Rank '92 ('91)	Concept	Segment	'91 sales in $ millions	% chg. sales	'91 units	% chg. units	FY ends	Ownership
351 (382)	Universal Studios Florida	Recreation	40.00**	14.3	15	0.0	6/92	MCI Corp.
352 (355)	U.S. Coast Guard	Military	39.80†**	0.0	398	0.0	9/91	—
353 (388)	The Cooker Bar & Grille	Dinner houses	39.50	17.2	15	25.0	12/91	Public/OTC
354 (A)	Miami Subs	FF sandwiches	39.00	A	85	A	12/91	Public/OTC
355 (316)	Skyline Chili	Family dining	39.00	−13.3	78	2.6	10/91	Public/OTC
356 (344)	Two Pesos Mexican Cafes	FF Mexican	38.70*	−3.7	34	17.2	3/92	Public/AMEX
357 (362)	Palm Restaurants	Dinner houses	38.50	1.3	11	0.0	12/91	Palm Mgmt. Corp.
358 (385)	Tippin's Restaurant & Pie Pantry	Family dining	38.20	12.4	20	0.0	2/92	Private
359 (—)	Claim Jumper Restaurants	Dinner houses	38.10	—	8	—	12/91	Southwest Foods
360 (395)	Arthur Treacher's	FF seafood	38.00	18.8	111	14.4	12/91	Private
361 (376)	Carlos Murphy's	FS Mexican	38.00	8.6	18	5.9	12/91	Private
362 (A)	Guest Quarters Suite Hotels	Lodging	38.00	A	28	−6.7	12/91	Private
363 (380)	T.J. Cinnamons Bakery	FF sweets	38.00	8.6	184	9.3	12/91	Signature Foods
364 (358)	Michigan State University	Education	37.80†*	−2.8	44	0.0	6/92	—
365 (—)	Bertucci's Brick Oven Pizzeria	FS pizza	37.50	—	26	—	12/91	Public/OTC
366 (323)	Bobby Rubino's Place for Ribs	Steakhouses/BBQ	37.50	−13.6	19	−5.0	12/91	Private
367 (—)	TS Restaurants	Dinner houses	37.50	—	13	—	12/91	Private
368 (370)	Happy Chef	Family dining	37.40*	1.9	60	1.7	5/92	Private
369 (241)	Prime Motor Inns	Lodging	37.00**	−47.1	40	−46.7	12/91	Public/NYSE
370 (A)	Loews Hotels	Lodging	36.90	A	28	A	12/91	Loews Corp.
371 (386)	Flik International	Contract mgmt.	36.90*	8.5	69	4.5	12/91	Private
372 (374)	Lamp Post Pizza	FF pizza	36.80	2.8	61	−4.7	12/91	Private
373 (—)	Bon Appétit Management Co.	Contract mgmt.	36.60*	—	43	—	6/92	Private
374 (383)	Valentino's	FS pizza	36.50*	6.4	43	0.0	3/92	Private
375 (356)	New Jersey Dept. of Human Services	Institutions	36.40†*	−7.1	18	28.6	6/92	—
376 (288)	Creative Restaurant Management	Dinner houses	36.00**	−30.1	15	−31.8	12/91	Private
377 (369)	Noble Roman's	FS pizza	35.80**	−3.2	73	−3.9	12/91	Private
378 (—)	Bain's Deli	FF sandwiches	35.50	—	81	—	12/91	Bain's Deli Fran. Assoc.
379 (351)	Spire's Restaurants	Family dining	35.40**	−11.5	23**	4.5	12/91	Private
380 (392)	Texas Dept. of Mental Health	Institutions	35.30†	7.0	26	−3.7	8/91	—
381 (—)	Pennsylvania State University	Education	35.30†*	—	31	—	6/92	—
382 (363)	Shells Restaurants	Dinner houses	35.10	−7.6	26	−7.1	12/91	Private
383 (397)	Flying J Travel Plazas	Retail	35.00*	9.4	43	−4.4	12/91	Private
384 (—)	Souplantation	Family dining	34.70**	—	22	—	9/91	Private
385 (315)	Freshëns Premium Yogurt	FF sweets	34.60*	−23.1	206	−14.5	8/91	Yogurt Ventures U.S.A.
386 (366)	Pietro's Pizza	FF pizza	34.50	−8.0	69	−12.7	12/91	Private
387 (391)	The Original Seafood Shanty	FS seafood	34.40**	4.2	14	0.0	9/91	Private
388 (377)	Elmer's Pancake & Steak House	Family dining	34.30	−2.0	27	−3.6	3/92	Private
389 (336)	Stouffer Specialty Restaurants	Dinner houses	34.00**	−19.0	16**	−20.0	12/91	Nestlé Ent.
390 (—)	Cucos Restaurantes	FS Mexican	33.70*	—	33	—	7/92	Public/OTC
391 (321)	Vie de France	FF sandwiches	33.50	−23.9	35	−16.7	12/91	Public/OTC
392 (A)	Rusty Pelican	FS seafood	33.40**	A	14	A	10/91	Green Leaf Ventures
393 (396)	Blue Ribbon Services	Contract mgmt.	33.20	3.8	70	2.9	9/91	Private
394 (393)	CVI Service Group	Contract mgmt.	33.00*	1.5	62	21.6	8/91	Private
395 (399)	Schwartz Brothers Restaurants	Dinner houses	33.00	3.1	15	0.0	12/91	Private
396 (—)	Mark Pi's	FF Chinese	33.00*	—	45	—	12/91	Private
397 (318)	Detroit Public Schools	Education	33.00†*	−26.3	250	1.6	6/92	—
398 (365)	Cheesecake Factory	Dinner houses	33.00**	−12.0	5	0.0	12/91	Private
399 (—)	The Great Steak & Fry Co.	FF sandwiches	32.00	—	110	—	12/91	Nicar Mgmt.
400 (A)	Northwest Airlines	Transportation	32.00**	A	2	A	12/91	Private

*Company estimate; **R&I estimate; †commercial equiv.; (A) No comparison possible with previous-year data; (R) Based on revised 1990 figures; (V) 20% of sales from vending

R&I 400: SEGMENTS

BURGERS ($36,372.6MM)

Organization	400 rank	Sales $MM
1. McDonald's	1	19,928.2
2. Burger King	2	6,200.0
3. Hardee's	5	3,431.0**
4. Wendy's	6	3,223.6
5. Jack In The Box	31	978.0
6. Carl's Jr.	39	614.0
7. Sonic Drive-Ins	49	518.0
8. Whataburger	76	318.4**
9. White Castle	82	300.0
10. Rally's Hamburgers	110	221.1
11. Krystal	117	211.0
12. Fuddruckers	130	177.7
13. Checkers Drive-In	238	73.5
14. Hamburger Hamlets	290	53.0
15. In-N-Out Burgers	334	42.6**
16. Arctic Circle	341	41.5
17. Central Park USA	343	41.0

CONTRACT MANAGEMENT ($14,249.6MM)

Organization	400 rank	Sales $MM
1. ARA Services	7	2,830.0
2. Marriott Management Services	9	2,500.0*
3. Gardner Merchant Food Services	12	2,158.6**
4. Canteen	18	1,460.0
5. Service America	33	915.0§
6. Morrison's Custom Management	38	618.0*
7. Ogden Services	50	510.0
8. Seiler's/FDI	66	375.0**
9. ServiceMaster	79	310.0**
10. Restaura Dining Services	95	250.0
11. The Wood Co.	108	224.3
12. daka	125	195.0
13. Harry M. Stevens	126	190.0
14. Sportservice	128	185.0
15. Concession Air	138	165.0
16. Club Corp. of America	140	160.0
17. Universal Ogden	147	144.0
18. Professional Food-Service Management	198	97.5
19. HDS Services	205	93.0
20. Wometco Food Services	207	91.0*
21. Guest Services	210	90.0*
22. Valley Innovative Management	220	82.5
23. All Seasons Services	248	70.0*
24. Sanese Services	256	65.0†
25. Guckenheimer	268	60.0
26. Nutrition Management Services	273	58.0
27. Levy Specialty Concessions	281	55.5
28. RA Restaurant Services	284	55.0
29. Southern Foodservice Management	293	51.5
30. Lackmann Food Service	296	51.0
31. Flik International	371	36.9*
32. Bon Appétit Management Co.	373	36.6*
33. Blue Ribbon Services	393	33.2
34. CVI Service Group	394	33.0(V)

400

PIZZA/ITALIAN ($12,831.9MM)

Organization	400 rank	Sales $MM
1. Pizza Hut	4	5,300.0
2. Domino's Pizza	10	2,400.0
3. Little Caesars	14	1,725.0
4. The Olive Garden	35	808.0*
5. Round Table Pizza	75	320.0
6. Sbarro	90	273.3
7. Godfather's Pizza	104	233.5
8. Shakey's	105	225.0
9. Pizza Inns	132	176.0*
10. Chuck E. Cheese	143	155.0**
11. Pizzeria Uno Restaurant & Bar	159	135.4
12. Papa Gino's	165	131.5
13. Mazzio's	179	114.8
14. Mr. Gatti's	181	113.4**
15. ShowBiz Pizza	246	70.4**
16. Hungry Howie's Pizza & Subs	262	62.0
17. Old Spaghetti Factory	263	62.0
18. California Pizza Kitchen	265	61.0*
19. Peter Piper	266	60.3**
20. The Spaghetti Warehouse	288	54.0*
21. LaRosa's Pizzerias	312	46.0
22. Sir Pizza	328	43.2*
23. The Pasta House	345	41.0
24. Mountain Mike's Pizza	349	40.0
25. Bertucci's Brick Oven Pizzeria	365	37.5
26. Lamp Post Pizza	372	36.8
27. Valentino's	374	36.5*
28. Noble Roman's	377	35.8**
29. Pietro's Pizza	386	34.5

LODGING ($11,653.2MM)

Organization	400 rank	Sales $MM
1. Sheraton	17	1,543.5
2. Hyatt Hotels	22	1,167.5**
3. Hilton Hotels	23	1,100.0
4. Marriott Lodging	25	1,083.0
5. Holiday Inn Hotels	32	965.6**
6. Choice Hotels	36	800.0
7. Westin Hotels & Resorts	40	580.0
8. Inter-Continental Hotels	54	499.0
9. Radisson Hotels	59	425.0
10. Ramada Hotels	69	348.0**
11. Days Inns of America	78	312.5**
12. Stouffer Hotels	106	225.0**
13. Red Lion	116	213.0
14. Four Seasons Hotels & Resorts	118	209.0
15. Ritz-Carlton Hotels	119	207.1**
16. Bally Casino Resorts	121	204.0**
17. Embassy Suites	139	165.0
18. Doubletree Hotels	156	137.0**
19. Caesar's World	161	135.0
20. Harrah's Casino Hotels	164	131.6
21. Omni Hotels	171	124.5
22. Circus Circus Enterprises	174	121.3**
23. Golden Nugget Casinos	208	90.4
24. Princess Hotels International	216	84.3**
25. Trusthouse Forte Hotels	236	75.0*
26. The Boyd Group	239	73.2
27. Wyndham Hotels & Resorts	243	72.0
28. Fairmont Hotels	259	64.1
29. Registry Hotel	272	60.0**
30. Adam's Mark Hotels	283	55.0
31. Resorts International	291	52.4
32. Showboat	308	46.8
33. Doral Hotels & Resorts	317	45.0**
34. Opryland Hotels	327	43.5
35. Aztar	336	42.0
36. Sonesta Hotels	347	41.0**
37. Guest Quarters Suite Hotels	362	38.0
38. Prime Motor Inns	369	37.0**
39. Loews Hotels	370	36.9

1991 sales; *company estimate; **R&I estimate; †commercial equivalent; (S) 48% of sales from vending; (U) 72% of sales from vending; (V) 20% of sales from vending

400: SEGMENTS

FAMILY DINING ($8,642.0MM)

Organization	400 rank	Sales $MM
1. Denny's	16	1,591.3
2. Shoney's	24	1,099.0
3. Big Boy	26	1,076.4**
4. Friendly's	48	530.0
5. Perkins Family Restaurants	52	505.0
6. International House of Pancakes	61	413.6
7. Bob Evans Restaurants	64	381.5**
8. Waffle House	77	312.7**
9. Bakers Square	88	279.0
10. Village Inn	96	245.7
11. Cracker Barrel Old Country Store	98	242.6
12. Marie Callender Pie Shops	101	240.8
13. Dobbs Houses	122	200.0*
14. Country Kitchen	129	182.4
15. PoFolks	152	140.0
16. Carrow's	157	136.0**
17. Lyon's Restaurants	170	125.1*
18. Kettle Restaurants	178	116.0
19. Steak 'n Shake	188	106.0
20. Eat'n Park	199	97.0
21. Howard Johnson	211	89.2
22. Huddle House	240	73.0
23. Shari's Restaurants	285	55.0
24. Soup Exchange	294	51.2**
25. Olga's Kitchen	306	49.0**
26. Swensen's Ice Cream	320	44.5**
27. King's Family Restaurants	346	41.0*
28. Skyline Chili	355	39.0
29. Tippin's Restaurant & Pie Pantry	358	38.2
30. Happy Chef	368	37.4*
31. Spire's Restaurants	379	35.4**
32. Souplantation	384	34.7**
33. Elmer's Pancake & Steak House	388	34.3

CHICKEN ($8,412.0MM)

1. KFC	3	6,200.0
2. Popeyes Famous Fried Chicken & Biscuits	45	540.2
3. Church's Chicken	51	506.6
4. Chick-fil-A	73	324.6
5. El Pollo Loco	127	185.9
6. Grandy's	133	175.9
7. Lee's Famous Recipe Chicken	148	143.8
8. Bojangles' Chicken & Biscuits	168	128.0
9. Brown's Chicken & Pasta	204	94.0
10. Mrs. Winner's Chicken & Biscuits	241	73.0*
11. Pudgie's Famous Chicken	350	40.0

Restaurants *say we're* FLAKY.

In our business, flakiness is a virtue. That's why we go overboard to ensure that our breaded fish products have the flaky texture and superior quality you've come to expect from Arctic Ice®. After all, we have a reputation to uphold. Questions? Call us at 1-800-252-7525. Or in Washington state at 206-282-3445.

ARCTIC ICE

Arctic Ice Fri-Cuts

For information circle 22

SWEETS ($6,188.9MM)

1. Dairy Queen	11	2,352.4**
2. Dunkin' Donuts	29	990.8**
3. Baskin-Robbins	34	829.7
4. TCBY	74	321.0
5. Braum's Ice Cream & Dairy Stores	134	175.3**
6. Mrs. Fields	144	155.0**
7. Carvel Ice Cream Bakery	151	140.0
8. Häagen-Dazs	162	135.0
9. Tastee-Freez	166	130.0
10. Mister Donut	187	107.1**
11. Daylight Donut Shops	189	105.4
12. Fosters Freeze	201	95.4
13. I Can't Believe It's Yogurt	209	90.0
14. Winchell's Donut House	214	85.0
15. Orange Julius	222	82.0**
16. The Original Cookie Co.	264	62.0
17. Cinnabon World Famous Cinnamon Rolls	267	60.0
18. Great American Chocolate Chip Cookie Co.	271	60.0**
19. David's Cookies	299	50.2**
20. Everything Yogurt & Salad Cafés	311	46.0
21. Bresler's Ice Cream & Yogurt	322	44.0
22. T.J. Cinnamons Bakery	363	38.0
23. Freshens Premium Yogurt	385	34.6*

DINNER HOUSES ($5,167.7MM)

1. T.G.I. Friday's	42	570.0
2. Chili's Grill & Bar	46	531.9*
3. Bennigan's	56	463.0**
4. Applebee's Neighborhood Grill & Bar	83	289.6
5. The Ground Round	84	288.6
6. Ruby Tuesday	99	241.5*
7. Houlihan's	124	198.2
8. Red Robin	135	173.2
9. Hard Rock Cafe	141	157.8**
10. Chart House	145	150.0
11. Specialty Restaurants	150	141.0

1991 sales; *company estimate; **R&I estimate; †commercial equivalent

continued on page 55

400: SEGMENTS

DINNER HOUSES (continued)

Organization	400 rank	Sales $MM
12. J.B.'s Restaurants	169	127.3
13. Black-eyed Pea	177	117.7**
14. Houston's Restaurants	191	102.9
15. Hooters Restaurants	194	100.0
16. Lettuce Entertain You Enterprises	200	95.5
17. Trans/Pacific Restaurants	212	86.2
18. Benihana	213	86.0
19. Bill Knapp's	228	76.8**
20. Darryl's	230	76.5
21. Brown Derby	231	76.1**
22. Restaurants Unlimited	250	69.9
23. O'Charley's Restaurant & Lounge	275	57.5
24. Trader Vic's	276	57.5
25. RA Theme Restaurants	279	56.5
26. Ark Restaurants	295	51.1
27. Entertainment One	301	50.0*
28. Levy Restaurants	314	45.5
29. Peasant Restaurants	316	45.0
30. Bombay Bicycle Club	318	44.8
31. Magic Pan	325	43.6**
32. Spectrum Restaurants	333	43.0**
33. The New York Restaurant Group	339	42.0*
34. Charlie Brown's	340	41.8
35. Bobby McGee's	342	41.0
36. The Cooker Bar & Grille	353	39.5
37. Palm Restaurants	357	38.5
38. Claim Jumper Restaurants	359	38.1
39. TS Restaurants	367	37.5
40. Creative Restaurant Management	376	36.0**
41. Shells Restaurants	382	35.1
42. Stouffer Specialty Restaurants	389	34.0**
43. Schwartz Brothers Restaurants	395	33.0
44. Cheesecake Factory	398	33.0**

STEAKHOUSES/ BARBECUE ($5,149.3MM)

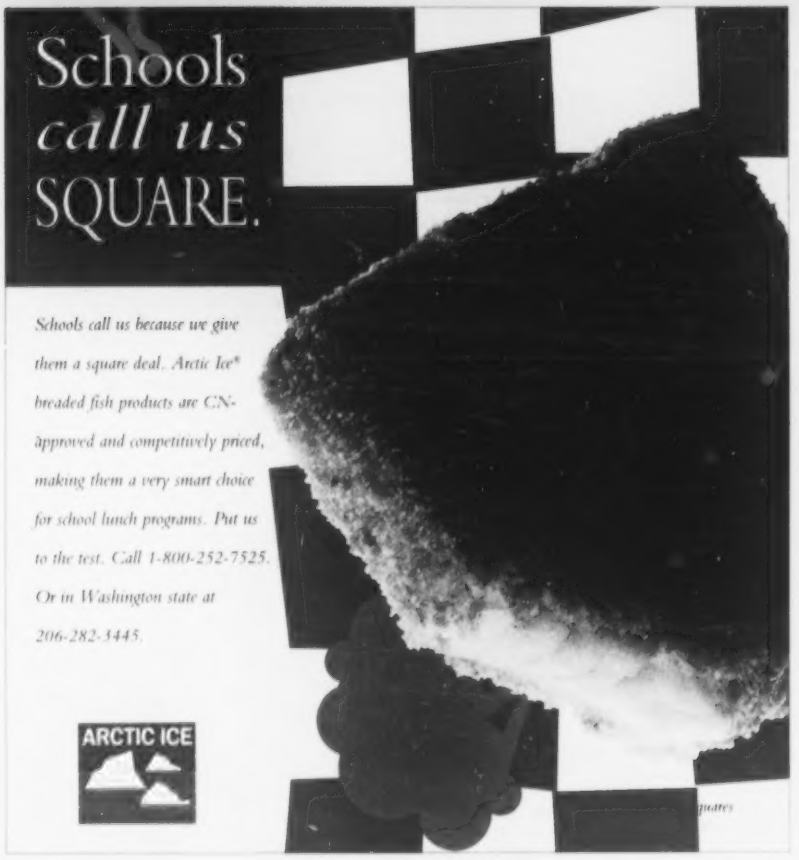
1. Sizzler	30	983.6*
2. Ponderosa	37	744.1**
3. Golden Corral	58	449.0
4. Western Sizzlin'	62	400.0
5. Bonanza	63	389.2**
6. Ryan's Family Steak Houses	68	355.1
7. Quincy's Family Steakhouses	86	283.3
8. Stuart Anderson's Restaurants	92	258.0**
9. Tony Roma's—A Place for Ribs	100	241.0
10. Steak & Ale	114	215.0**
11. Western Steer Family Steakhouses	173	121.4
12. Outback Steakhouse	206	91.0
13. Sonny's Real Pit Bar-B-Q	221	82.0
14. Damon's	232	75.0
15. Sirloin Stockade Restaurant	245	71.0
16. Ruth's Chris Steak House	251	69.0
17. Mountain Jack's	278	57.3**
18. Hungry Hunter	292	52.1**
19. Bill Miller Barbeque	300	50.0*
20. Longhorn Steaks	330	43.1**
21. Mr. Steak	344	41.0
22. Morton's of Chicago Steakhouses	348	40.6
23. Bobby Rubino's Place for Ribs	366	37.5

MILITARY ($4,966.3MM)

1. U.S. Army Center of Excellence, Subsistence	21	1,400.0†*
2. U.S. Navy Food Service Systems	28	1,045.2†
3. Army & Air Force Exchange Service	41	574.2
4. U.S.A.F. Morale, Welfare, Rec. & Serv. Agency	81	300.7†
5. U.S. Marine Corps	87	280.0†
6. Dept. of Veterans Affairs	91	269.1†
7. U.S. Air Force Clubs Branch	93	252.4
8. U.S. Navy Officer's and Enlisted Club System	107	224.8
9. U.S. Army Community & Family Support	123	198.3
10. Navy Exchange Service Command	136	168.0†
11. U.S.M.C. Morale, Welfare & Rec. Supp.	185	109.0
12. Veterans Canteen Service	270	60.0
13. U.S. Army Medical Dept.	319	44.8†
14. U.S. Coast Guard	352	39.8†**

MEXICAN ($4,748.2MM)

1. Taco Bell	8	2,800.0
2. Chi-Chi's	57	456.3
3. El Torito	65	375.0*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ARCTIC ICE
For information circle 27

1991 sales; *company estimate; **R&I estimate; †commercial equivalent

continued on page 57

400: SEGMENTS

MEXICAN (continued)

Organization	400 rank	Sales $MM
4. Del Taco	131	177.0**
5. Taco John's	155	137.0*
6. El Chico	183	110.8**
7. Taco Time	196	100.0*
8. Garcia's Mexican Restaurants	203	95.0
9. Acapulco Restaurants	219	82.6
10. Pancho's Mexican Buffet	226	78.1
11. Chevys Mexican Restaurants	247	70.0
12. Taco Bueno	261	63.0
13. Red Onion	297	51.0*
14. Casa Olé Restaurants & Cantinas	337	42.0
15. Two Pesos Mexican Cafes	356	38.7*
16. Carlos Murphy's	361	38.0
17. Cucos Restaurantes	390	33.7*

SANDWICHES ($4,461.6MM)

1. Arby's	19	1,450.0
2. Subway	20	1,400.0
3. Roy Rogers	103	236.6**
4. Rax	111	220.8
5. A&W Restaurants	112	217.0
6. Blimpie Subs & Salads	172	122.2
7. Wienerschnitzel	175	119.7
8. D'Angelo Sandwich Shops	215	85.0*
9. Au Bon Pain	224	80.0
10. Nathan's Famous	249	70.0*
11. Togo's Eatery	252	69.0
12. Schlotzsky's	269	60.0
13. A&W Hot Dogs & More	287	54.0*
14. Maid-Rite	302	50.0*
15. Jerry's Subs & Pizza	321	44.3
16. Mr. Hero	331	43.0
17. Miami Subs	354	39.0
18. Bain's Deli	378	35.5
19. Vie de France	391	33.5
20. The Great Steak & Fry Co.	399	32.0

SEAFOOD ($2,955.6MM)

1. Red Lobster	15	1,600.0**
2. Long John Silver's Seafood Shoppes	43	555.0*
3. Captain D's	60	420.8
4. Skipper's	192	100.5
5. L&N Seafood	244	71.5*
6. C.A. Muer	289	53.0
7. Legal Sea Foods	305	49.0*
8. Arthur Treacher's	360	38.0
9. The Original Seafood Shanty	387	34.4**
10. Rusty Pelican	392	33.4**

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TRANSPORTATION ($2,811.2MM)

1. Caterair International	27	1,049.0
2. United Airlines	44	550.0
3. Dobbs International Services	53	500.0
4. Sky Chefs	55	470.0
5. Trans World Airlines	163	132.5
6. AMTRAK	227	77.7
7. Northwest Airlines	400	32.0**

C-STORES ($2,535.3MM)

1. 7-Eleven	13	1,996.9**
2. Circle K	115	213.3**
3. Wawa	154	139.9
4. Casey's General Store	184	110.2*
5. Emro Marketing	233	75.0*

CAFETERIAS ($1,756.2MM)

1. Luby's Cafeterias	71	330.4
2. Morrison's Cafeterias	80	306.4*
3. Piccadilly Cafeterias	89	275.0*
4. Furr's Cafeterias	113	216.0**
5. Old Country Buffet	120	207.0**
6. Wyatt's Cafeterias	137	166.0
7. King's Table Buffets	217	84.2
8. K&W Cafeterias	234	75.0*
9. Homestyle Family Buffet	303	49.4
10. MCL Cafeterias	309	46.8**

HEALTH CARE ($1,616.7MM)

1. United Health	94	252.0†
2. Beverly Enterprises	102	239.5†**
3. National Medical Enterprises	109	224.0†**
4. Daughters of Charity Health Systems	146	146.4†*
5. Hospital Corp. of America	149	142.8†**
6. Humana	182	112.0†
7. Health Trust	229	76.7†**
8. Manor Health Care	237	73.8†*

1991 sales; *company estimate; **R&I estimate; †commercial equivalent

continued on page 60

R&I 400: SEGMENTS

HEALTH CARE (continued)

Organization	400 rank	Sales $MM
9. New York City Health & Hospitals	257	64.8†**
10. Evangelical Lutheran Good Samaritan Society	277	57.5†**
11. Life Care Center	304	49.1**
12. Health Care & Retirement Corp.	307	48.4†
13. Texas Health Enterprises	315	45.5†**
14. American Medical International	335	42.2†**
15. National Healthcorp	338	42.0†

INSTITUTIONS ($1,489.5MM)

Organization	400 rank	Sales $MM
1. California Dept. of Corrections	85	288.4†
2. Federal Bureau of Prisons	142	155.1†
3. Florida Dept. of Corrections	176	119.0†
4. New York State Dept. Correctional Services	180	113.7†
5. New Jersey Dept. of Corrections	193	100.3†
6. California Dept. of Rehabilitation	195	100.0†
7. Michigan Dept. of Corrections	223	81.9†
8. New York State Office of Mental Health	242	72.9†
9. Pennsylvania Dept. of Corrections	254	66.4†
10. Texas Dept. of Criminal Justice	255	66.4†*
11. New York State Office of Mental Retardation	274	57.7†
12. Ohio Dept. of Rehabilitation & Correction	282	55.1†**
13. California Dept. of Developmental Services	298	50.4†**
14. Pennsylvania Dept. of Public Welfare	310	46.6†*
15. North Carolina Dept. of Corrections	323	43.9†*
16. New Jersey Dept. of Human Services	375	36.4†*
17. Texas Dept. of Mental Health & Mental Retardation	380	35.3†

EDUCATION ($1,262.6MM)

Organization	400 rank	Sales $MM
1. New York City Board of Education	67	363.9†*
2. Los Angeles Unified School District	97	245.6†*
3. Chicago Public Schools	158	135.8†*
4. Dade County (Fla.) Schools	190	104.6†*
5. Houston Independent School District	260	64.1†*
6. Philadelphia School District	280	56.1†*
7. Hawaii Statewide School System	286	54.6†*
8. Broward County (Fla.) School Board	313	45.7†*
9. Dallas Independent School District	329	43.1†
10. Hillsborough County (Fla.) School Board	332	43.0†*
11. Michigan State University	364	37.8†*
12. Pennsylvania State University	381	35.3†*
13. Detroit Public Schools	397	33.0†*

RECREATION ($1,233.9MM)

Organization	400 rank	Sales $MM
1. Walt Disney World Co.	47	531.0
2. Carnival Cruise Lines	160	135.4†**
3. Royal Caribbean Cruise Line	167	129.4†
4. Busch Entertainment	186	108.0
5. Cineplex Odeon	197	99.2**
6. Six Flags	218	83.0**
7. Holland America Line	258	64.4†
8. Leiserv	326	43.5
9. Universal Studios Florida	351	40.0**

RETAIL ($1,118.3MM)

Organization	400 rank	Sales $MM
1. Wal-Mart Stores	70	331.6**
2. K mart	72	326.0
3. Woolworth	153	140.0
4. Dayton Hudson Department Store Co.	202	95.0
5. Target Stores	225	80.0
6. Nordstrom	253	67.0**
7. McCrory Stores	324	43.7**
8. Flying J Travel Plazas	383	35.0*

1991 sales; *company estimate; **R&I estimate; †commercial equivalent

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Jack In The Box's Sirloin Steak Sandwich ($2.99) accounted for 15% of sales in test.

Burger Chains Sizzle with Activity

Big players heat up competition with bold promos and menu items.

400

Battling flat to slow-growing sales for the past two years has burger-chain executives more aggressive than ever. And their emphasis has shifted from new menu items to new *service* items. Case in point: McDonald's money-back quality guarantee (the muscle behind its "What You Want Is What You Get" campaign).

Not that burger executives have been ignoring menus: The newest items are a bit more sophisticated (for instance, Jack In The Box's sirloin sandwich and Wendy's entree salads) and carry a higher price as well.

McDONALD'S

1991 sales: $19,928.0MM
400 ranking: 1
Segment ranking: 1

A new satisfaction-or-your-money-back guarantee is key to strengthening McDonald's domestic sales. Aside from the obvious, the "customer care" program includes a promise that drive-thru orders have been double-checked and touches such as free ice cream for kids, drink refills and greeters at the restaurants.

On the menu, pizza and pasta dinners are in test in Tennessee and New York. Baked apple pies, a more healthful supplement to the fried-pie line, are rolling systemwide.

New projects seem to be working for McDonald's this year: It is expanding service of Friendly Sky Meals on United Airlines to all flights from Chicago to Orlando, Fla., and will add 15 more Leaps and Bounds play centers over the next year.

Other news from the Golden Arches: China's second McDonald's opened in Beijing in April. Former chief financial officer Jack Greenberg was named vice chairman, only the second to hold that office in McDonald's history. And the company now advertises on billboards for the first time in its history: The 20,000 McD's billboards reach about 98% of the U.S. population, says Chief Marketing Officer Paul Schrage.

BURGER KING

1991 sales: $6,200.0MM
400 ranking: 2
Segment ranking: 2

These days, Burger King likens itself to a Toyota dealer. It used to have only one model to sell to franchisees; now, kiosks, in-line restaurants in shopping malls and double-drive-thrus offer variety to potential investors.

The Miami-based chain also appeals to franchisees by offering them the free-

dom to develop their own product lines. "It's not a stretch of the imagination to see a core Burger King menu in the future, with local or regional extensions," says spokesman Michael Evans.

Restaurants in Seattle, for instance, are testing espresso. In Detroit, one store introduced low-calorie turkey, chicken-salad and tuna-salad sandwiches ($1.79 each) called B.K. Healthies.

Meanwhile, the chain is testing "The Lighter Way" menu in 350 locations across the country. With prices ranging from $2.99 for Weight Watchers fettuccine to $1.37 for a side salad, the menu features items that are all under 300 calories.

HARDEE'S

*1991 sales: $3,431.0MM***

Bone-in fried chicken soon will appear on all Hardee's menus.

400 ranking: 5

Segment ranking: 3

After purchasing Roy Rogers, then struggling to convert them to Hardee's (one result of which was the departure of President Bill Prather), Rocky Mount, N.C.-based Hardee's has relented, and will run its 650 Roy Rogers outlets under their original name.

The purchase wasn't a total failure, however: Hardee's plans to roll Roy Rogers-recipe fried chicken systemwide by the end of 1992.

WENDY'S

1991 sales: $3,223.6MM

400 ranking: 5

Segment ranking: 4

With founder Dave Thomas at the wheel, Dublin, Ohio-based Wendy's has driven past the difficulties of the late 1980s and is well along the road to growth, fueled by 5% sales gains in 1991.

The personable Wendy's chairman appears in a promotion called "Vacation Dave." "Vacation Dave" ties into a sweepstakes promotion, "Summer of 99." A 1992 Jeep Cherokee, 99 six-packs of a soft drink, 99 Junior Bacon Cheeseburgers, and a 99-hour Princess cruise, among other prizes with a "99" theme, will be given away. The promotion is linked to the chain's nine-item, 99-cent Value Menu.

Another promo, Dave's Favorites, includes Chicken Cordon Bleu and Dave's Deluxe, a bacon cheeseburger with grilled onions.

Wendy's newest items are Fresh Salads To Go. The five salads are priced from 99 cents to $2.99. Two of the salads, Grilled Chicken and Deluxe Garden, feature a soft breadstick. New products in test include chicken and hamburger specialty sandwiches.

Wendy's expects to add 250 new stores in 1992.

JACK IN THE BOX

1991 sales: $978.0MM

400 ranking: 31

Segment ranking: 5

According to Paul Haack,

continued on page 66

BURGERS
$36.4 billion

32.1% of all
400 commercial sales

TOP TRENDS

- ☐ Value menus here to stay
- ☐ Smaller buildings
- ☐ Nontraditional sites
- ☐ Third-tier foreign markets: Mexico, Asia
- ☐ Business as usual at double-drive-thru chains

NEW MENU ITEMS

- ☐ McDonald's: Baked pies
- ☐ Burger King: Lighter Way low-fat menu items
- ☐ Hardee's: Fried chicken
- ☐ Wendy's: New salads
- ☐ Jack In The Box: Grilled sirloin, chicken-mushroom, pastrami melt sandwiches

ONE GREAT PROMO

Bob, Krystal's "spokeshead," will run for president this year, says Tom Whitley, vice president of marketing. This month, ballots will appear in Krystal stores, so customers may vote for Bob, Bill, George or Ross. The chain will let customers know how the election is going. Whitley predicts a landslide for Bob: "He's got an off-the-wall attitude our customers relate to."

Sonic's reformulated chicken and fish sandwiches are rolling systemwide.

Krystal's new Chili Cheese Fries account for 5% of total sales, good for a snack item, company executives say.

continued from page 63

vice president of marketing communications, the biggest news at Jack In The Box is the public offering by parent Foodmaker this spring.

In addition, four new items have joined the menu board during the past six months. Two of them, a chicken-mushroom sandwich and a pastrami melt sandwich (both $2.99), are industry firsts, Haack says. Toasted ravioli and mini chimichangas ($2.39 for a small order and $3.29 for a large) are new additions to the Finger Foods menu.

Jack In The Box plans to open 60 more restaurants this year, in the United States, Hong Kong and Mexico. Most of the new restaurants will be franchised. The chain also is experimenting with a smaller prototype.

CARL'S JR.

1991 sales: $614.0MM
400 ranking: 39
Segment ranking: 6

This spring, Anaheim, Calif.-based Carl's Jr. opened its first restaurant in Beijing, China. The 634-unit chain is trying to develop more foreign markets, especially in Mexico and Asia. In fact, its largest restaurant is in Monterrey, Mexico, where the seating capacity is more than three times that of a stateside Carl's Jr. restaurant.

In the United States, the company launched an aggressive advertising campaign called "Go For The Food." It features company founder Carl Karcher and a cast of animated characters, including the company's trademark Happy Star.

Sales of the chain's new teriyaki chicken sandwich—chicken breast marinated in a teriyaki sauce and topped with pineapple and tomato—have surpassed all other sandwiches. The sandwich, introduced in November, sells for $2.79.

To meet the demand for more deli-style products, this spring the chain rolled out a turkey club sandwich, with two strips of bacon, sliced turkey breast and alfalfa sprouts on a French roll ($2.99).

SONIC DRIVE-INS

1991 sales: $518.0MM
400 ranking: 49
Segment ranking: 7

Oklahoma City-based Sonic is rolling chicken and fish sandwiches systemwide.

Both sandwiches were introduced some time ago, but ran into problems, says Gary Johnson, vice president of purchasing/distribution. "There was no speced product, so they kind of died on the vine," he says. Sonic took the sandwiches off the menu, reformulated them, found a supplier to make them and returned them to the menu.

These days, the chicken sandwich ($2.49) is in about 90% of the stores and accounts for about 6% of sales. The fish sandwich ($2.29) is in about 80% of the stores and accounts for 3% of sales.

In September, Sonic will run its biannual Brown Bag Special—two burgers, two fries and two soft drinks for $4.49.

KRYSTAL

1991 sales: $211.0MM
400 ranking: 117
Segment ranking: 11

Chattanooga, Tenn.-based Krystal also went public earlier this year. Krystal will use the proceeds to help meet its goal of 500 restaurants (80% franchised) by 1996.

In smaller markets, the Krystal store most likely will be a Krystal Kwik, a limited-menu double-drive-thru. Krystal now has about 30 of the smaller units open, and has a few menu items in test expressly for the Kwiks, though Tom Whitley, vice president of marketing, won't elaborate.

The chain's newest menu item, Corn Pups, is on the menus at both the Kwiks and traditional Krystals. The cornmeal-battered beef hot dogs, served on a stick and priced at 79 cents, debuted in June after racking up 5% of sales in test stores. Another new item, Chili Cheese Fries ($1.29), debuted in April.

In test are a broiled chicken sandwich and more breakfast items (breakfast accounts for 15% of Krystal's sales). The best-seller remains the Krystal: Along with fries and a soft drink, it accounts for 80% of sales, Whitley says.

—Lisa Bertagnoli and Karen Cheney

ARA Regional V.P. Dick Bissinger greets S. Truett Cathy, founder of Chick-fil-A, at Georgia Tech. It's the first college venture for the chicken chain.

Branding Peaks While Wellness, Display Cooking Gain Ground

National chain branding, wellness programs and display cooking of such items as pasta and ethnic specialties still are the talk of the contract segment.

But industry rumblings suggest that the chain branding trend might be hitting its peak, at least in those accounts where volume is small and customers return each day.

"A Taco Bell kiosk works well on a huge commuter college campus or a stadium, but it will grow stale in a corporate setting very quickly," says one B&I foodservice director.

Many branding critics argue that if a foodservice management company can't make a better product than the national chain, it shouldn't be in the food business. Also, repercussions from local franchisees who are losing business to these nontraditional units seem inevitable.

Except for large accounts, national brand popularity might be short-lived.

400

But branding proponents say there's definitely a place for national brands in high-volume, transitional-customer accounts. Branding works, they say, when handled correctly—meaning the contractor continually surveys customers on preferences and monitors sales to ensure that the brand remains a good seller—which, in many, many cases, it is.

Nutrition programs are growing more sophisticated, feeding the customer more nutritiously in a fun and painless way—the guilt is gone. Flik, for example, offers gourmet chutneys and relishes created for its new Season It Light program. Smoking, better knowledge of herbs and seasonings, and less fatty cooking methods such as grilling also improve the flavor of foods.

ARA SERVICES

1991 sales: $2,830.0MM

400 ranking: 7

Segment ranking: 1

Major new accounts for

continued on page 74

CONTRACTORS
$14.2 billion

10.2% of all 400 sales

TOP TRENDS

- ☐ Branding
- ☐ Wellness programs
- ☐ Display cooking
- ☐ Second-generation ethnics: regional Asian and Italian
- ☐ Targeting health-care, education and recreation segments
- ☐ Quality-improvement processes
- ☐ Improving customer service
- ☐ Serving more fresh food
- ☐ Value deals, combo meals
- ☐ By-the-size instead of by-the-ounce pricing

BEST SELLERS

- ☐ Ethnic specialties from display cooking stations
- ☐ Grilled anything, especially chicken
- ☐ Gourmet sandwiches
- ☐ Homemade soup
- ☐ Rich desserts
- ☐ Value meals, soup and salad, soup and sandwich
- ☐ Bottled water and juice

Marriott's Chef's Network encourages accounts to swap recipes.

Confetti-stuffed roast pork loin is one of the nutritional Heartland Selections from The Wood Co.

continued from page 71

ARA include the Pennsylvania Convention center in Philadelphia and Oriole Park at Camden Yards, Baltimore, where more than 200 dining clubs, concessions and lounges offer everything from fresh deli sandwiches to barbecue. ARA operates 23 stadium and arena locations across the country.

ARA continues to offer both in-house and national chain brands. Most recently, the company signed a branding venture with Chick-fil-A at Georgia Tech. And multiunit Express concepts, featuring mini Taco Bell, Pizza Hut and KFC kiosks, are open at General Electric in Cincinnati.

MARRIOTT MANAGEMENT SERVICES

*1991 sales: $2,500.0MM**
400 ranking: 9
Segment ranking: 2

Last year, Marriott sharpened its focus on food with the introduction of themed cuisine. Display and self-serve stations—including Pasta Pronto, Mongolian Wok, Gourmet Salads, Louie Louie Seafood Bar, Taqueria, and Sandwich & Salad—quickly became best sellers in accounts.

A new program, Chef's Network, will keep the company focused on food. The network encourages Marriott chefs across the country to share recipes, techniques, trends, merchandising ideas and other food information.

The hot topic for 1992 and beyond is quality. The total quality management process is in its infancy at Marriott, but the commitment is starting at the top.

Marriott's Host Division has agreed in principle to buy the majority of Dial Corp.'s 436 Dobbs Houses airport concessions this summer.

GARDNER MERCHANT

*1991 sales: $2,158.6MM***
400 ranking: 12
Segment ranking: 3

Rather than operating under three brands names (Trusthouse Forte Food Services, Creative Gourmets and Epoch), all three contract operations became Gardner Merchant in 1991.

While the company's customers still demand nutritional menu choices, they like to reward themselves with decadent desserts—a trend Gardner Merchant obliges with its Signature Series Desserts, introduced in the fall of 1991. The selection includes 19 upscale desserts such as phyllo-wrapped poached pear and Cheddar; Chocolate Bread Panache; Mardi Gras Shortcake made with berries and other fruits, berry sauce and honey yogurt icing; and Apple Harvest baked-apple dessert.

CANTEEN

1991 sales: $1,460.0MM
400 ranking: 18
Segment ranking: 4

In 1992, Canteen plans to target accounts in four segments—health care, schools, colleges and correctional facilities. All of these are less penetrated by contract management than B&I (which suffered in sales last year) and all are considered somewhat less sensitive to economic shifts.

The menu offered more variety in 1991, and will continue to do so. Last year, Canteen introduced a lean hamburger, a grilled chicken sandwich and 12 new varieties of its in-house Pazzelli's Pizza. Seasoned trout, a new yeast roll, a low-

*Company estimate. **R&I estimate

Guckenheimer will add Indian food to its ethinic offerings this year.

fat steak sandwich and beef fajitas debut this year. Special promotions will offer hot chicken wings, Philly steak sandwiches, and a catfish and hush-puppy feast.

SERVICE AMERICA

*1991 sales: $915.0MM****
400 ranking: 33
Segment ranking: 5

The PizzAmore signature pizza concept rolled out earlier this year, sporting such varieties as Mexican, Hawaiian, Californian (topped with artichokes) the Supreme (pepperoni, green pepper, onion, sausage) and Buffalo Style White with tomatoes (but no tomato sauce).

Service America has taken its branding strategy, selling well-known food manufacturers' products in vending accounts, a step further with BRAVO, a 12-month calendar of special sales promotions. Sweepstakes, premium merchandise offers, retail coupons and instant-win prizes involve more than 100 brand-name products.

MORRISON'S CUSTOM MANAGEMENT

*1991 sales: $618.0MM**
400 ranking: 38
Segment ranking: 6

Morrison's combined the desire for home-style comfort foods and the demand for takeout into its second generation of Fast Takes. Fast Takes II offers such items as a meatloaf sandwich, Reuben bagel, Southwestern chili, mesquite-grilled brisket, Roman steak and Cheddar cheese-steak sandwiches, and a 90% lean beef burger—all packaged to go.

Branding continues to generate great revenue, according to Fred Whitlock, senior vice president of national accounts, a branding proponent. So far, Pizza Hut, I Can't Believe It's Yogurt, Miss Karen's Yogurt, Baskin-Robbins, Dunkin' Donuts and Carl's Jr. are operating in Morrison's accounts. Negotiations with Hardee's, KFC, Taco Bell and Miami Subs are near completion.

THE WOOD CO.

1991 sales: $224.3MM
400 ranking: 108
Segment ranking: 11

Heartland Selections, the menu portion of The Wood Co.'s To Your Health wellness program, is up and running in 95% of its accounts. It is receiving great reviews and generating healthy sales, according to Colette Moore, communications manager.

Such chef-developed selections as traditional lamb stew, spinach fettuccine with endive and bacon or tricolor peppers, broiled salmon with pineapple salsa, and pork tenderloin all contain no more than 350 calories; some are only 150 calories.

Next up in 1992: Bakers Junction, combining the in-house baked goods and takeout trends into one modular unit. Freshly baked muffins, brownies, biscuits and cookies are offered with more selections to come.

GUCKENHEIMER ENTERPRISES

1991 sales: $60.0MM
400 ranking: 268
Segment ranking: 25

Food for Thought, Guckenheimer's wellness program launched in 1991, was well-received, but the panini sandwich and gourmet salad bar concepts continue to be the company's best sellers.

This spring, Asian Adventures, featuring specialty dishes from China, Vietnam, Thailand and Japan, were all the rage. Next up, Indian cuisine—in a program that's yet to be named.

The company's expansion interests are directed at the upscale niche of the retirement-living segment. Guckenheimer is not considering branding with a national chain. The company is considering price-per-size plates over by-the-ounce sales.

—Beth Lorenzini

Guckenheimer's Trattoria panini sandwiches are served hot or cold on focaccia, herbed baguettes and corn rye.

*Company estimate; ***48% of sales from vending

Pizzeria Uno's Plizzettas, such as eggplant and artichoke and fancy cheese thin crust, enhance perceived value.

Pizza/Italian Shows Strong Growth Curve

Leaders and upstarts add multiple units, new concepts.

400

Americans' love for Italian food has yet to cool. Just as independent restaurateurs around the country are opening restaurants to feed that love, so are the nation's big pizza and Italian chains.

Segment leaders such as Pizza Hut and The Olive Garden are adding units at a spirited pace. Pizza Hut is trying to corner the market—its new Fastino's drive-thru concept is a counterpoint to upscale pizza and pasta offerings designed to draw sophisticated diners to "red roof" restaurants. (See sidebar, this feature.) Newcomers such as Bertucci's Brick Oven Pizzeria are wooing patrons with innovative twists.

PIZZA HUT

1991 sales: $5,300.0MM

400 ranking: 4

Segment ranking: 1

Pizza Hut's goal is to be the first choice for every pizza occasion, in the words of Pat Williamson, Pizza Hut executive vice president.

To that end, the No. 1 pizza chain is working to strengthen its position in full-service and delivery, and in nontraditional arenas such as schools, employee cafeterias, and kiosks in airports, c-stores and stadiums.

At the other end of the spectrum, Pizza Hut Cafe, a restaurant in Pizza Hut's headquarters town, Wichita, Kan., is a testing ground for pasta and upscale pizzas.

During the past year at the original concept, executives have concentrated heavily on marketing. The new "Deliver Me" ad campaign featuring singer Aretha Franklin has been "good but not great for us," says Williamson. The chain experienced single-digit growth in delivery with sales topping $1 billion. An additional 300 delivery units will be added to the system during 1992. On the menu front, improvements include a move to put 25% more toppings on the "Lovers" line of pizzas.

DOMINO'S

1991 sales: $2,400.0MM

400 ranking: 10

Segment ranking: 2

Since the beginning of the year, the privately held, Ann

Arbor, Mich.-based chain has taken dramatic steps to revitalize sales and to counterattack Pizza Hut's strong move into delivery.

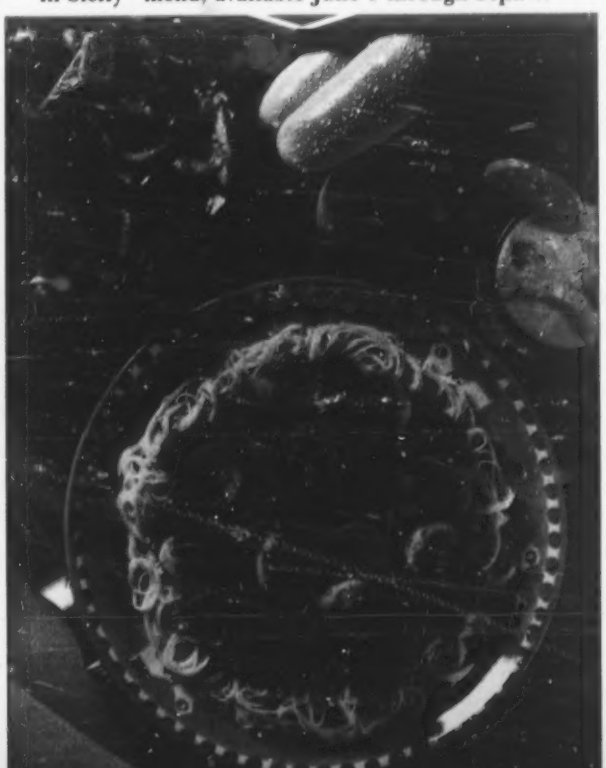
Company founder and majority owner Tom Monaghan took back the president's post from David Black in December and formed a new executive team. Since then, he has closed 45 underperforming units and might close another 55. Monaghan also closed regional offices in Minneapolis and Columbus, Ohio, saving about $700,000.

In February, the chain introduced a reformulated pizza that sports a thicker and more flavorful crust, 45% more cheese and 30% more toppings, according to a company spokesperson.

Domino's new pizza recipe has more cheese and toppings and a "tastier" crust.

And in May, Domino's asked franchisees to test alternative delivery guarantees to the 30-minute promise. The changes could also help curb insurance liability costs. Some franchisees are testing a "total satisfaction" guarantee that gives customers a refund if they are not satisfied with either the product or the service.

Capellini Primavera from The Olive Garden's "Summer in Sicily" menu, available June 1 through Sept. 7.



LITTLE CAESARS

1991 sales: $1,725.0MM
400 ranking: 14
Segment ranking: 3

Detroit-based Little Caesars will add 925 units this year and projects 1992 year-end sales at $2.26 billion. Almost half of the unit growth will come from the chain's joint venture with K mart.

New products that have been rolled out and well-received include pepperoni Crazy Bread and ravioli-shaped candy called "Chocolate Chocolate Ravioli Ravioli." Started as a promotion, the dessert has a chocolate filling and a premium white-chocolate coating.

THE OLIVE GARDEN

*1991 sales: $808.0MM**
400 ranking: 35
Segment ranking: 4

Rapid expansion for this General Mills Restaurants concept will continue with 50 new units in 1992.

The Orlando, Fla.-based chain also concentrates on keeping the menu fresh by holding quarterly "menu events" and by annually improving or changing 30% of the standard menu.

For example, the "Italian Discovery" menu ran from March 2 to April 19. It featured new soup, appetizer, dessert and wine offerings, and four new entrees. Entrees included ravioli stuffed with a blend of diced black olives, herbs and cheeses and covered with a béchamel cream sauce, more black olives and Parmesan cheese.

continued on page 80

*Company estimate

PIZZA/ITALIAN
$12.8 billion

11.3% of all
400 commercial sales

TOP TRENDS

- ☐ Rapid unit growth
- ☐ Alternative delivery concepts such as kiosks, takeout- and delivery-only units
- ☐ Breakfast pizza
- ☐ Dessert pizzas, in-house bakeries, dessert promotions

COMING UP

- ☐ Pizza Hut: new fast-food concept, plus kiosks in airports, stadiums and employee cafeterias
- ☐ Shakey's: Kiosks and pizza and chicken delivery units
- ☐ Bertucci's: Takeout tests and delivery-only concept in smaller markets

NEW MENU ITEMS

- ☐ Domino's: Thicker crust, more cheese and toppings
- ☐ Shakey's: Hawaiian and pesto chicken pizza
- ☐ Godfather's Pizza: "Super Hawaiian" pizza with ham, pineapple, bacon, green pepper and cheese
- ☐ Little Caesars in K mart stores: Breakfast pizza (egg, cheese, bacon or sausage pizza on a croissant crust), $1.59

PIZZA PRONTO FROM THE HUT

Pizza Hut has stepped into the fast-food arena with Fastino's—a low-priced Italian concept that opened in March at a shopping center in Wichita, Kan.

The drive-thru/takeout offers three pizzas, lasagna, fettuccine Alfredo, pasta primavera, cheese tortellini and spaghetti.

Pepperoni, pepperoni and beef, and deluxe, five-topping pizzas are sold by the slice. Twelve-inch pizzas sell from $4.59 to $4.99. Two-pizza deals range from $7.99 to $8.99. Side orders include garden salad, garlic bread, Italian ice and cheesecake on a stick.

Pizza Hut says additional Fastino's will open by the end of the third quarter.

Instrumental in the Fastino's test are (l. to r.) Director of Marketing Ken Howe, Executive Vice President of Development Pat Williamson and Director of Operations Dave Snyder.

Pizzas get smaller and sport more unusual toppings.

California Pizza Kitchen's newest creation: artichoke, olive and caper pizza.

continued from page 79

Along with daily blackboard specials, new menu items that have proved popular include chicken Florentine. The menu also varies on a regional basis.

PIZZERIA UNO

1991 sales: $135.4MM
400 ranking: 159
Segment ranking: 11

Facing sharp declines in sales and profits, Uno has rolled out a line of new menu items designed to offer customers better value and, at the same time, improve margins. Company executives hope the move will build check averages by 12% to $8.50, and increase food costs only 1.2%.

The West Roxbury, Mass.-based chain has added pasta items, including tortellini and lasagna. In addition, it is offering a flat 9- or 10-inch "Plizzetta," cost-effective because a smaller amount of toppings is required to cover the pie. Uno also is replacing 6- and 7-inch deep-dish pies with 9- and 10-inch pizzas.

To improve dessert sales, Uno operators are placing a booklet at the tables featuring photographs of all dessert items.

CALIFORNIA PIZZA KITCHEN

*1991 sales: $61.0MM**
400 ranking: 265
Segment ranking: 18

PepsiCo has purchased a 50% equity interest in the Los Angeles-based upscale pizza and pasta concept. CPK co-founders Larry Flax and Rick Rosenfield will remain in control of the operations. PepsiCo will obtain two seats on CPK's four-person board of directors.

CPK will open eight units across the United States in 1992. With PepsiCo's financial strength behind it, the company expects to accelerate growth plans in 1993.

Menu innovations for the year include artichoke, olive and caper pizza, and rosemary chicken and potato pizza. New pasta dishes are carbonara and Mediterranean pasta served with spaghetti, penne or angel hair pasta and diced Roma tomatoes, garlic, Mediterranean olives, capers, red wine and fresh Italian herbs.

BERTUCCI'S

1991 sales: $37.5MM
400 ranking: 365
Segment ranking: 25

This hot growth company is working on several business strategies.

Most notably, the Woburn, Mass.-based chain is rolling out delivery and testing a new concept called Bertucci Menucci—a takeout and delivery-only concept for smaller markets. In April, the company added an Express Lunch pizza and salad combo priced between $4.75 and $4.95.

To keep the menu fresh, Bertucci's has hired a chef from Italy to develop more pizza and pasta.

The company also raised $18.5 million through a secondary equity offering earlier this year to fund its 30% new unit growth rate for the next several years.

—Jeff Weinstein

*Company estimate

Tourism and Occupancy Declines Spur Switch to Casual Concepts

Lower-priced entrees and fixed-price specials lure hotel guests.

Hotel dining sales dipped 5% to 15% in 1991—with luxury chains posting even higher declines. The downturn is directly related to low occupancies brought on by drops in business and leisure travel.

"Any major economic upswing is 18 to 24 months away," predicts Jonathan Tisch, president, Loews Hotels. "Travelers can't be seduced by champagne and caviar when budgets are tailored to chicken and mashed potatoes."

The same mind-set has forced hotels to rethink their fine-dining concepts. "People will forgo captains, sommeliers and fancy crystal for more casual settings and menus, and wider entree choices and price ranges," says Doug Cole, food and beverage director for Sheraton.

The swing is to single, flexible, multipurpose dining rooms serving breakfast, lunch and dinner. Fixed-price menus, food-and-wine pairing specials and lower average checks help maintain sales.

SHERATON

1991 sales: $1,543.5MM
400 ranking: 17
Segment ranking: 1

Restaurant sales dipped 5%, but banquet covers were off only about 2% because Sheraton marketed itself aggressively for local functions.

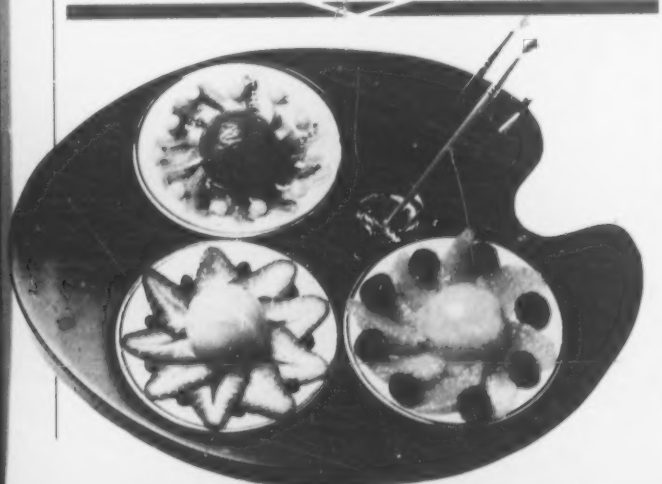
Boston-based Sheraton is cutting the size of its restaurants and changing menus to reflect a wider variety of selections at comfortable prices. Future operations will be more flexible, with both lobby and outside entrances.

Sheraton Manhattan's Bistro 790, for example, is marketed as a separate entity from the hotel, but the menu is the same one used for room service. The Hartford, Conn., Sheraton's 95 Church Street restaurant boasts a mobile buffet in the lounge that doubles as a breakfast and hors d'oeuvres bar. It rolls away to reveal a dance floor.

Menus tout comfort foods: grilled chicken, meatloaf, seafood Cobb salad and Root Chips—deep-fried celery heart, rutabaga and beet slices used for snacks.

continued on page 88

Le Montrachet dessert sampler from the Las Vegas Hilton: an example of dressed-up menu presentations.



LODGING
$11.7 billion

10.3% of all
400 commercial sales

TOP TRENDS

- ☐ Converting fine-dining restaurants into casual or multipurpose restaurants
- ☐ Leasing restaurant space to independent operators
- ☐ Adding fixed-price menus and specials
- ☐ Menus emphasizing appetizers as alternative to entrees
- ☐ Marketing food-and-wine pairing programs
- ☐ Promoting banquet sales in a buyers' market
- ☐ Dressing up plate presentations
- ☐ Merchandising brand-name wines and alcoholic beverages

WHAT'S NEW

- ☐ Sheraton: Root Chips (snacks of deep-fried celery heart, rutabaga and beet slices)
- ☐ Hyatt Hotels: Cuisine Naturelle (low-calorie, low-cholesterol, low-fat menu)
- ☐ Radisson Hotels: Inspired Cuisine (gourmet health and nutrition menu)
- ☐ Ritz-Carlton Hotels: Fixed-price breakfasts

continued from page 85

Hotels court local business to compensate for lower occupancy rates.

HYATT HOTELS
*1991 sales: $1,167.5MM***
400 ranking: 22
Segment ranking: 2

Hyatt Hotels, Chicago, reports that covers fell 10% to 12% in 1991. Banquets—60% of food sales—were off 4.2%.

In January, the company launched Cuisine Naturelle, a low-calorie, low-cholesterol, low-fat menu. Its fish, chicken and pasta entrees average $12 to $15. The program, already available through room service, has been earmarked for children's, employee and banquet menus as well.

Wine lists have been halved, and retail mark-ups cut from three to two-and-a-half times the wholesale price in an effort to downplay wine snobbery. As a result, sales have increased 4% to 5%.

Hyatt's new concepts include Chow Bella, with an Italian-Oriental menu; Taxi's, an American bistro; and Spike's, a sports bar.

HILTON HOTELS
1991 sales: $1,100.0MM
400 ranking: 23
Segment ranking: 3

Hilton's hotels are converting fine-dining units into casual or multipurpose eateries. For example, Buckingham's, a white-tablecloth restaurant in the Chicago Hilton, used to do 60 or 70 nightly covers. Now, as a steakhouse, it can do 300.

Banquets, 50% of food and beverage sales, dropped 3%-4%. Room-service covers continue to surge (up 20% since 1988) because of improved service, food quality and menu variety, says the company.

Menus for the Beverly Hills, Calif.-based chain salute American regional and ethnic cuisines. Coffee shops feature tacos, sushi and pasta. Restaurants offer Italian, Caribbean and Pacific Rim dishes. Beef remains a favorite, followed by fish and pasta.

Lunch buffets, marketed to meeting groups and locals pressed for time, provide value and offer variety. Dinner menus feature heavy appetizer listings for the growing number of light eaters.

HOLIDAY INN HOTELS
*1991 sales: $965.6MM***
400 ranking: 32
Segment ranking: 5

Holiday Inn, Atlanta, is emphasizing value-oriented service to break down consumer perception of hotel pricing as high. All-inclusive breakfasts, special dinner entrees and free kids' meals are guest incentives.

The company has streamlined menus, tailoring them to local markets and shifting to more regional, health- and quality-oriented fare. It also has sharpened presentations. Salads and pasta combos are part of heart-smart, weight-conscious entrees marketed to corporate clientele.

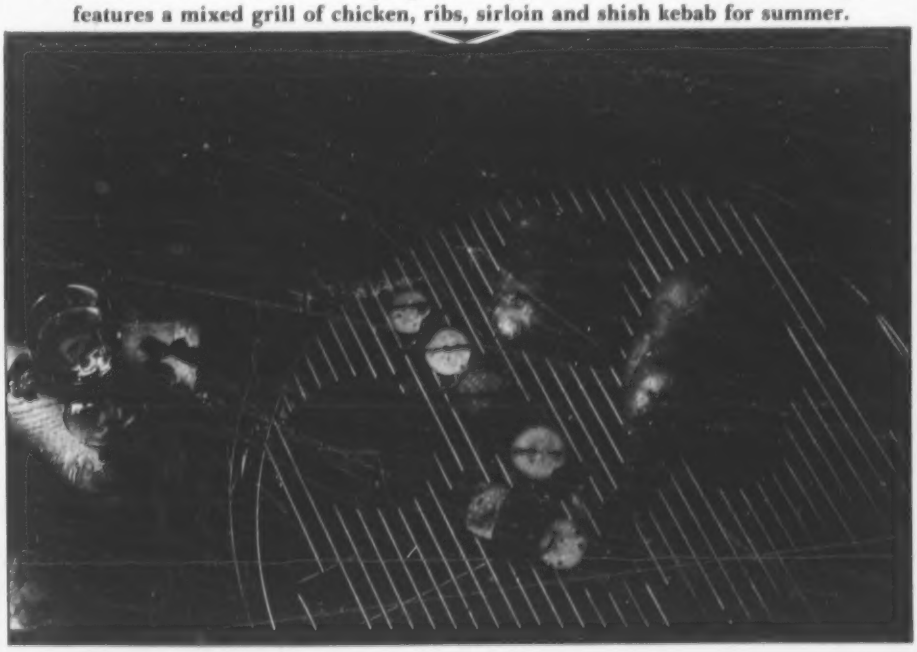
Catering divisions target wedding and reunion markets with special room rates and perks such as complimentary champagne.

Wine sales are up 22%, which the company credits mostly to food-wine pairings and specific varietal and wine-by-the-glass promotions.

RADISSON HOTELS
1991 sales: $425.0MM
400 ranking: 59
Segment ranking: 9

Radisson attributes positive

Red Lion's new seasonal menu program—supported by systemwide marketing—features a mixed grill of chicken, ribs, sirloin and shish kebab for summer.



**R&I estimate

Buyers call the shots in a soft banquet and convention market.

Sheraton restaurants' casual decor, as at this Walt Disney World Dolphin operation, reflects guest preferences.

1991 results—occupancy rates up 3.8% in the United States and 3% worldwide—to strategically planned marketing efforts.

The Minneapolis-based company took a risk and advertised heavily during the Gulf War when other chains pulled back. The dividends paid off.

Foodservice sales jumped about 7%, and catering was up 13%. Radisson credits its "Big Name, Small Meetings," marketing campaign, which offered preferred customers extra services at no charge. The perks encouraged groups to book additional meetings.

Menu priorities are health, nutrition and *sous-vide*. "Inspired Cuisine," a gourmet health and nutrition menu developed with The Culinary Institute of America, Hyde Park, N.Y., was launched in February. *Sous-vide* entrees, vegetables and soups, tested in six properties from March through September 1991, will gradually be incorporated into other markets as owner needs and customer profiles dictate.

RED LION INNS
1991 sales: $213.0MM
400 ranking: 116
Segment ranking: 13

Vancouver, Wash.-based Red Lion Inns wants to recapture in-house customer business, an eroding base for several years. A systemwide marketing program, complete with fliers, table tents and seasonal menus, is under way.

Catering accounts for 45% to 50% of total hotel revenue, and up to 60% of F&B sales at some facilities. The company is taking an even more aggressive approach to its banquet program, zeroing in on local markets and supporting sales efforts with more competitive pricing.

Customers' desire for more casual, less expensive dining, confirmed by higher coffeeshop sales, will be tested in lounges. The chain is testing lighter menus of sandwiches, burgers, pizza, burritos and other hand-held foods in Vancouver. It will expand the test to three or four other properties this year.

FOUR SEASONS HOTELS & RESORTS
1991 sales: $209.0MM
400 ranking: 118
Segment ranking: 14

Food and beverage sales slipped 5% to 10% for Four Seasons Hotels & Resorts, Toronto. Hotel guest counts were down, but local restaurant business thwarted further decreases. Catering, which softened or fell off in most parts of the United States, jumped 10% in Texas.

The company hasn't raised menu prices across the board since September 1991. Eliminating high-end entrees reduced average checks by $10—for example, the linguine with lobster ($24) became seafood linguine ($17).

RITZ-CARLTON HOTELS
*1991 sales: $207.1MM***
400 ranking: 119
Segment ranking: 15

Atlanta-based Ritz-Carlton opened six properties in 1991. Four more are scheduled for completion this year, including a Barcelona, Spain, location due in time for the summer Olympics.

Fine dining remains Ritz-Carlton's mainstay, and the luxury chain's two- and three-star *Michelin Guide* chefs have helped restaurants maintain revenue levels. Fixed-price seven-course meals, ranging from $30 to $70 depending on location, can account for as much as 40% of sales. But Four Seasons operations in general are leaning toward lighter food preparation. The company is eyeing upscale grills for sites chiefly in the Midwest. Also, fixed-price breakfast menus have begun attracting value-oriented customers.

LOEWS HOTELS
1991 sales: $36.9MM
400 ranking: 370
Segment ranking: 39

Business overall was down 10% to 15% for New York-based Loews. Coronado Bay Resort, San Diego, debuted in October 1991, but no new hotels are planned. Instead, Loews will purchase and refurbish existing properties.

All-purpose restaurants will replace fine-dining operations as the chain buys and rebuilds. First in line: Loews Vanderbilt in Nashville, Tenn., which is in the midst of a $4 million face lift.

—Barbara Magan Dawson

**R&I estimate

Shoney's soup and salad bar offers the best in "light" and healthful items.

Cater to Kids, Please Parents

Family-dining chains keep kids happy with games and giveaways.

Family-dining chains have fine-tuned their "parent appeal" by pitching good value and maintaining harmony with children.

Chains such as Denny's, Big Boy, IHOP and Country Kitchen put emphasis on pleasing youngsters with toys, activity books and special children's menus. After all, when kids are happy, so are parents.

Getting good value is a top concern for parents, too, especially in a tight economy. Denny's, the top family-dining chain, debuted a new value menu; other chains have held down prices of regular items and introduced more value-priced specials.

The development of new "light" items, most notably stir-fries and chicken sandwiches, also reflects customers' nutrition concerns.

DENNY'S

400

1991 sales: $1,591.3MM
400 rank: 16
Segment rank: 1

After serving more than 3.5 million people a free birthday meal in 1991, Denny's rolled out a separate birthday menu this year. Since each guest brings in an average of 1.2 to 1.4 paying customers, the Spartanburg, S.C.-based chain hopes that the new menu will establish Denny's as the place to celebrate birthdays.

Denny's also introduced a "Base Hit" value menu that offers items ranging from $1.99 to $4.99. "We feel that it was an answer to customers looking for a value-priced family meal," says Jenifer Harmon, national advertising director.

One of the chain's most successful promotions in 1991, says Harmon, was its hologram baseball card collection. The cards were such a hit that the chain began giving them away again in May with the purchase of a soft drink and any signature Grand Slam entree.

"We've also tried to introduce lighter products this year," says Harmon. For instance, the chain rolled out a Stir Fry Slam (vegetable and chicken or steak), and an All Star Kabob with one skewer of teriyaki steak and another of Caribbean

continued on page 96

FAMILY DINING
$8.6 billion

7.6% of all
400 commercial sales

TOP TRENDS

- ☐ More children's menus and games
- ☐ Expanded "light" offerings
- ☐ Value-priced specials
- ☐ Seasonal menus
- ☐ Takeout bakeries

BEST SELLERS

- ☐ Denny's: all Grand Slam entrees
- ☐ Friendly's: Watermelon Roll made with sherbet and chocolate chips
- ☐ IHOP: Rooty Tooty Fresh 'N' Fruity breakfast combination
- ☐ Big Boy: The Hamburger Classic
- ☐ Bob Evans: The Daily Dinner special

BEST PROMOS

- ☐ IHOP: "Pick-A-Pair-Of-Pancakes"
- ☐ Shoney's: Stir-fry lunch and dinner special ($4.99)
- ☐ Bob Evans: "Celebrate the Fresh Taste of Summer"
- ☐ Denny's: Hologram baseball card giveaway

Baby boomers demand value-priced meals that meet family budgets.

continued from page 93

chicken served with rice ($7).

SHONEY'S

1991 sales: $1,099.0MM
400 rank: 24
Segment rank: 2

Shoney's went stir-crazy this spring with a new $4.99 stir-fry lunch and dinner promotion. "We're trying to listen more to what our customers want, and stir-fry is a hot item," says John Gaylor, advertising manager.

Through July 25, the chain is promoting ham and cheese, Reuben, and chicken-salad croissam sandwiches ($3.99). Later this summer, Shoney's will introduce a "burger basket," with chips or fries, a pickle spear and a burger in an environmentally friendly washable wicker basket ($3.99).

The Nashville, Tenn.-based chain, which reported record earnings for first-quarter 1992, is looking into developing more takeout foods, says Gaylor. Already, 100 restaurants have opened pie shops, where customers can choose either slices ($1.59 to $1.99) or whole pies ($5.99 to $8.99).

BIG BOY

*1991 sales: $1,076.4MM***
400 rank: 26
Segment rank: 3

Warren, Mich.-based Big Boy added one entree, Chicken Wisconsin (broiled chicken breast topped with Cheddar cheese and broccoli, $5.99) to its regular menu.

Big Boy continues to focus on low-fat, low-calorie menu fare. Now in its seventh year, the chain's Health Smart menu has become a signature for the chain. "It's not just a short section; it's an entire page," says Tony Michaels, vice president of marketing. Many local hospitals have participated in evaluating the menu, which also provides a nutritional breakdown of each entree.

But the chain attributes its 9% increase in sales this year to a promotion of its signature Big Boy burger served with coleslaw and fries for $2.99, says Michaels.

In addition, the "Food & Fun Meal" bolstered sales of children's meals by 30%, says Michaels. The chain introduced two specials—a meal served in a sand pail and a "time capsule" theme that teaches children about other eras.

FRIENDLY'S

1991 sales: $530.0MM
400 rank: 48
Segment rank: 4

Striving to enhance its family appeal, Friendly's has upgraded its burger line and added a skinless, boneless chicken breast sandwich for $5. "We wanted to position ourselves as a family restaurant, not just an ice cream restaurant," says Michael Kelly, vice president of marketing.

The Wilbraham, Mass.-based chain also is introducing more "light" items. In August, it will debut a new line of pita sandwiches filled with shrimp, chicken or turkey, priced at about $5.

Customers seem to believe that those low-calorie entrees will make up for dessert, says Kelly, who adds that ice cream consumption

Sales of children's meals soared with the debut of Big Boy's "Food & Fun Meals." Kids explore new worlds, find their way through mazes and enjoy take-home gifts.

**R&I estimate

Bob Evans greets summer with a new menu filled with fruit and "light" items.

Country Kitchen and other family-dining chains stir up menus with new stir-fry combinations.

is especially high in the Northeast.

INTERNATIONAL HOUSE OF PANCAKES

1991 sales: $413.6MM
400 rank: 61
Segment rank: 6

With sleek new exteriors and bright, peach-colored interiors, IHOP's remodeled restaurants are sure to attract more customers. Last year, the Glendale, Calif.-based chain redesigned 96 locations, expanding the seating capacity from typically 80 to as much as 160.

IHOP's public offering last July helped the chain reduce debt and add 23 restaurants in 1991. The chain plans to open 30 more restaurants this year.

The chain's "Pick-A-Pair-Of-Pancakes" promotion might be a tongue-twister, but it's also a palate-pleaser. For $2.99 to $3.49, it features any two specialty pancakes, two strips of bacon and two eggs.

Children keep busy with "Pancake Kids," a series of four plastic characters such as Betty Buttermilk and Peter Potato. "With the growth in baby boomers, we recognized the need to give their children things that have play value," says Steve Pettise, vice president of marketing.

BOB EVANS

*1991 sales: $381.5MM***
400 rank: 64
Segment rank: 7

Bob Evans rolled out a new summer menu with "light" items such as a fresh-fruit bowl that consists of half a cantaloupe filled with fresh bananas, pineapple chunks, strawberries and grapes ($4.95).

The chain also debuted a new skillet breakfast line, featuring a scrambled egg "shell." The Fiesta Skillet Breakfast, for instance, is an egg "shell" filled with sausage, diced potatoes, green and red peppers, onions and mild picante sauce ($4.75).

Dinner business was up 12% in the third quarter due to the Columbus, Ohio-based chain's Daily Dinner special, says spokeswoman Tammy Roberts. The special offers items that aren't on the regular menu such as turkey and dressing or chicken pot pie ($5.25 to $5.75).

COUNTRY KITCHEN

1991 sales: $182.4MM
400 rank: 129
Segment rank: 14

Instead of a guardian angel, Country Kitchen seems to have a guardian grandma. However shrewd the Minneapolis-based chain's menu and marketing moves, they are based on old-fashioned virtues grandmothers hold dear: frugality and making little ones feel at home.

In describing the company's programs to reduce labor and simplify operations, Jon Ostrov, vice president of marketing, talks about ingredients. "A new ingredient is not an orphan. It has multiple uses." For example, Country Kitchen's chicken strips and beef strips appeared in the summer of 1991 as beef and chicken fajita salads. Those same two products appeared in the fall with a new flavor profile: Teriyaki glaze, Oriental vegetables and rice transformed them into chicken and beef stir-fries. The two dishes now account for 5% of total sales, Ostrov says.

Country Kitchen now is looking at the chicken and beef strip products for possible use in premium skillet breakfasts and sandwiches, and in full fajitas (not just fajita salads).

Country Kitchen also plans to attract families with children by making the restaurant child friendly: providing new, attractive high chairs; setting the table for children (sans knife and fork); providing food, toy or other distraction immediately; and equipping restaurant with take-home, sealed-lid plastic cups with flexible straws in six fluorescent colors. These amenities will be backed up by a server-training program that starts with a "10 Commandments of Kids" poster, a child-based menu promotion in the summer of 1993, and a genuine menu for kids—"not just adult food scaled down in portion."

What's good for kids will be good for grown-ups, too, says Ostrov. They'll appreciate the menu additions of a quality steak and entree salads, "real" china and flatware, and adult beverages in a wholesome family atmosphere. **—K.C.**

**R&I estimate

Chicken Chains Leave the Skin off Menu Additions

Chicken chains' new skin-free and broiled entrees address demands for more healthful fare. At the same time, new nonchicken menu items diversify their selections. Nontraditional methods of distribution such as free-standing units and drive-thru-only units will help chains reach more customers.

Skin-free chicken and nonchicken items join the menus at chicken chains.

400

KFC
1991 sales: $6,200.0MM
400 ranking: 3
Segment ranking: 1

Louisville, Ky.-based KFC, the perennial leader of the 400 fast-food chicken segment, had double-digit sales growth in 1991—primarily because of new units and fewer price promotions.

The batch of new units includes seven non-traditional locations, such as a countertop merchandiser in a San Diego State University cafeteria; another is a kiosk at the Louisville Zoo. The units have been successful and the chain plans to install more soon.

New products introduced in 1991 include Skinfree Crispy chicken and Honey BBQ Wings. In 1992, Honey BBQ Chicken, Oriental Wings, chocolate chunk cookies and pie slices were rolled out.

POPEYES FAMOUS FRIED CHICKEN
1991 sales: $540.2MM
400 ranking: 45
Segment ranking: 2

After a protracted battle for the chain he began, Popeyes founder Al Copeland will be out of the picture this summer. A group led by former Arby's executive Frank Belatti will step in to manage Popeyes and its sister concept, Church's.

CHURCH'S CHICKEN
1991 sales: $506.6MM
400 ranking: 51
Segment ranking: 3

Church's Chicken, Jefferson, La., lost about $7 million in annual sales from 1990 to 1991 and closed 39 units. In the same year it opened 27.

This year, the chain is emphasizing value-priced combination deals to raise sales. It is increasing the number of marketing events and is shortening the event periods

continued on page 106

Lee's Famous Recipe's Country Lite Skinless chicken is one of many "healthful" chicken-segment menu additions.

CHICKEN
$8.4 billion

7.4% of all
400 commercial sales

TOP TRENDS

- Skinless chicken: Chick-fil-A, Pudgie's, KFC, Lee's
- Nonchicken menu additions: Pudgie's (seafood and ribs), Brown's (pasta and sandwiches), El Pollo Loco (steak fajita tacos and burritos)
- Nontraditional stores: KFC kiosks, Lee's Truckstops of America restaurant, free-standing Chick-fil-As

BEST PROMOS

- Church's 40th Anniversary Celebration: Month-long sweepstakes promotion during May giving away over $40,000 in cash prizes and 10 trips for two anywhere in the continental United States
- Church's year-long promo with Coca-Cola to benefit the United Negro College Fund and the Hispanic Association of Colleges & Universities: 1% of sales of large drinks will go to the organizations; Coke USA will match up to $100,000

El Pollo Loco feels the effects of more skinless chicken from competitors.

continued from page 101
to four weeks each.

Church's also is testing lower drink prices in the New Orleans market: small, 49 cents; regular, 59 cents; and large, 79 cents.

CHICK-FIL-A
1991 sales: $324.6MM
400 ranking: 73
Segment ranking: 4

With 25 units to be opened this year, Atlanta-based Chick-fil-A plans to continue growing. Eleven will be free-standing units, offering quick drive-thru service; a fresh, fast breakfast menu; and longer hours.

Added to the menu in March 1992 were Grilled 'n Lites—two marinated and chargrilled chicken breast tenderloins on a skewer. Chick-fil-A claims they are the lowest in fat and calories of any fast-food chicken entree in the industry.

EL POLLO LOCO
1991 sales: $185.9MM
400 ranking: 127
Segment ranking: 5

Irvine, Calif.-based El Pollo Loco repositioned itself within the market in 1991 when it saw the concept did not perform as well outside its core California market. The result: the closing of 55 units, mostly franchised.

The 16 new units that opened and the nine that are slated to open this year will feature some of the chain's new menu items, for example, steak fajita tacos and burritos. The skirt steak used in both is marinated and flame-broiled—the same treatment El Pollo Loco gives its chicken.

LEE'S FAMOUS RECIPE CHICKEN
1991 sales: $143.8MM
400 ranking: 148
Segment ranking: 7

Lee's Famous Recipe, Nashville, Tenn., targeted the health-conscious consumer with one new product in 1991: Country Lite Skinless chicken. It also reformulated its gravy and breading. Quite a few products are in test for 1992, though the company won't give details.

In October 1991, Lee's began aggressively marketing its catering function as a catering consulting service. To enhance its catering image, Lee's purchased mini-vans to be driven by selected area supervisors specifically for catering jobs.

In the same month, Lee's opened its first restaurant in a Truckstops of America unit (the largest truck stop chain in America).

Sales were down $1.2 million from 1990; nine units were opened and 12 closed. In 1992, Lee's plans on adding 13 units.

El Pollo Loco, Irvine, Calif., introduced skirt steak fajita tacos and burritos this year.

PUDGIE'S FAMOUS CHICKEN
1991 sales: $40.0MM
400 ranking: 350
Segment ranking: 11

Ranking 11th in the chicken segment is a victory for Pudgie's Famous Chicken: This is the Woodbury, N.Y.-based chain's first 400 appearance. The 11-year-old chain is one of the first to center its menu on skinfree, marinated, roasted chicken.

Now Pudgie's is a chain on the move, having opened 60 units in 1991 and with plans to open 70 more in 1992. It is negotiating with a large Japanese corporation for franchise rights to Japan.

In addition to skinless fried and marinated, then roasted chicken, Pudgie's menu offers ribs and seafood. It is testing an all-white-meat chicken salad on all menus. The salad is served as a side dish, on a roll as a sandwich and on a bed of lettuce as an entree. It also is testing English-style fish and chips and canola oil for cooking. In 1991, Pudgie's rolled out biscuits; in 1992, the chain will debut popcorn shrimp.

Most Pudgie's stores are takeout/delivery units, but the chain is testing a double-drive-thru/carryout concept. **—Brenda McCarthy**

Not by Yogurt Alone

Chains hope salads, baked goods and even health food will increase sales.

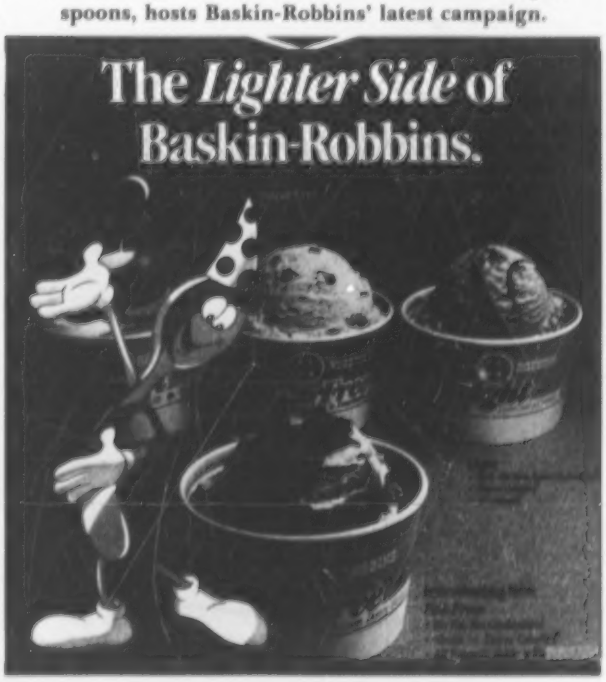
Sweets chains' signature items—cookies, frozen yogurt and the like—just don't take the cake anymore. To relieve customer boredom, many chains are expanding product lines to increase sales. TCBY sells Mrs. Fields cookies, brownies and muffins in about 251 stores. While Everything Yogurt always sold a limited line of lunch entrees such as quiche and pita sandwiches, it has refocused its menu and now is Everything Yogurt & Salad Cafe. Eight varieties of fresh salad include niçoise, pasta with mixed vegetables, chef, house, Caesar and seafood.

400

Menu expansion also has spread to ice-cream chains.

Carvel, Baskin-Robbins and Bresler's either have or are testing café or bakery concepts. Ice cream and frozen yogurt cakes, pies and novelties are a bigger business than ever, and customers will be able to find more luncheon fare and regular baked goods in sweets shops in the next few years.

The Spokespoon, modeled after the chain's sampler spoons, hosts Baskin-Robbins' latest campaign.



DAIRY QUEEN

*1991 sales: $2,352.4MM***

400 ranking: 11

Segment ranking: 1

The Minneapolis-based chain introduced a line of gourmet frozen cakes in 1991 to encourage sales of the desserts beyond the traditional "special occasion," according to Ed Watson, executive vice president of operations. Flavors include Black Forest, caramel nut fudge and apple crumb. The cakes account for 10% to 12% of total cake sales.

Three new Blizzards debut this summer: Mud Pie, Rocky Road and Chocolate Chip Cookie Dough. In four days, franchisees who tested the new Blizzards ran out of product meant to last three weeks.

DUNKIN' DONUTS

*1991 sales: $990.8MM***

400 ranking: 29

Segment ranking: 2

The biggest growth vehicle for the Randolph, Mass.-

continued on page 114

SWEETS
$6.2 billion

5.5% of all 400 commercial sales

TOP TRENDS

- ☐ Expanded-menu cafe concepts offering soup, salad, sandwiches
- ☐ Adding baked goods to the menu
- ☐ Expanding with nontraditional units (carts, kiosks) in institutions
- ☐ Gaining more of the children's market

NEW MENU ITEMS

- ☐ Frozen cakes and pies
- ☐ Novelties such as yogurt on a stick
- ☐ New flavors of shakes and malts swirled with confections
- ☐ Baked goods such as muffins, cookies, brownies, pastries
- ☐ Value deals such as Baskin-Robbins' (buy one scoop, get a second for 49 cents) and Carvel's (buy a full-size cake, get two smaller ones for $4)

**R&I estimate

From Carvel to DQ to TCBY, cakes and other frozen novelties are big business.

Cannoli are among the most recent of Carvel's novelty "bakery" products, which include holiday theme cakes.

continued from page 111

based chain is nontraditional units in nontraditional facilities. Dunkin' Donuts kiosks, mini satellite stores, carts and display cases are showing up in colleges, corporate dining rooms and hospitals across the country.

Dunkin' Donuts Minis, introduced in February as a limited-time deal, are selling so well that they most likely will stay on the menu.

BASKIN-ROBBINS

1991 sales: $829.7MM

400 ranking: 34

Segment ranking: 3

A major campaign is underway at Baskin-Robbins this year. The Spokespoon, BR's pink, animated mascot who is touting special deals and new products in the media, was modeled after the sampling spoons for which the Glendale, Calif.-based chain is known.

Some new products this year include a premium frozen yogurt on a stick and chocolate-covered ice cream bars in Tiny Toon Adventures packaging. (Tiny Toons are baby versions of Warner Bros. Looney Tunes characters.)

Baskin-Robbins Bon Doux, a bakery concept, has been in test in West Hollywood.

It sells muffins, pastries, bread, cakes and other French-style baked goods in addition to ice cream.

TCBY

1991 sales: $321.0MM
400 ranking: 74
Segment ranking: 4

Good franchisee relations is the chain's main focus, according to Herren Hickingbotham, chairman. As part of this emphasis, Charles Cocotas, formerly head of Boston Chicken rotisserie chicken chain, signed on as president and CEO of TCBY systems this year.

Last summer, TCBY reduced the wholesale price it charges operators by 10%. Also, as the chain expands into more nontraditional unit locations (in colleges, hospitals, arenas), area franchisees will be given the first opportunity to manage those deals.

In 1991, sales of specialty pies and cakes (sold premade whole and in slices) were good enough to draw more emphasis this year. TCBY is rolling out its Pie & Cakery theme touting birthday specials and custom cakes. Yogurt Party Parfaits served in pilsners and the Moo-Malt ($1.89 to $2.29) also debuted in 1992.

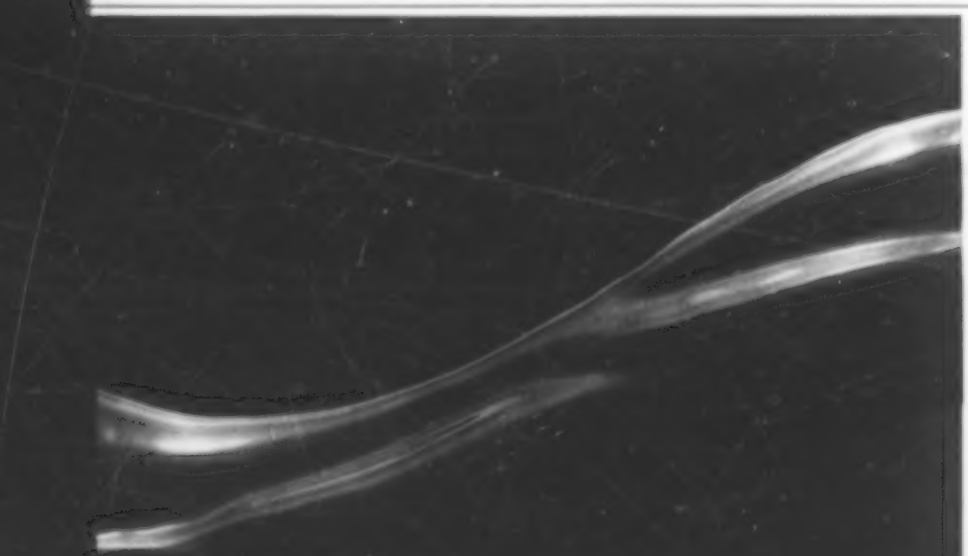
The chain is keeping an open mind about menu extensions of the soup, salad and sandwich variety, says Hickingbotham, but no plans are concrete yet.

CARVEL

1991 sales: $140.0MM
400 ranking: 151
Segment ranking: 7

Repositioning itself as Carvel Ice Cream Bakery took time, energy and capital in 1991, and the process continues. The new outdoor logo and signs are up in 50% of the stores. To set off the Farmington, Conn.-based chain's new bakery products, 63% of units have new menu boards and 53% added display equipment.

Those products, heavily advertised last year and this year, include $8.99 holiday theme cakes such as Easter bunny, turkey and Santa cakes and a line of elegant classic cakes. Most were sold with a "buy one, get two mini-cakes for $4 more." New in 1992 are cannoli and fruit-flavored swirl cakes. —B.L.



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Service, Value Top Dinner Houses' Lists

Conspicuous spending is out, but diners will pay for value.

In 1992, conspicuous spending among consumers is out. Back-to-basics among dinner-house operators is in. For both groups, ironically, price is not the major issue. Value is. "That's what brings people into restaurants today," says Chart House Marketing Communications Director Mike Plante.

Other operators say service has become the No. 1 issue. "Diners are choosing restaurants as much for the caliber of service as for the food quality," says Restaurant Unlimited's Marketing Vice President Richard Giboney.

Image adjustments have come into play as well. J.B.'s Restaurants is looking for a more upscale audience. After an internal marketing study revealed that customers think of it as a steakhouse, Chart House is fighting an identity crisis. In fact, the chain sells as much fish as it does steak.

400

T.G.I. FRIDAY'S

1991 sales: $570.0MM

400 ranking: 42

Segment ranking: 1

Friday's had "a great year" in 1991, reports Chief Financial Officer Stephen King. Sales were up overall, although receipts for comparable-store sales were down slightly.

"The most significant thing we did was hold menu prices firm," says King.

In October, the Dallas-based chain introduced a low-fat, low-calorie Friday's Lite menu, featuring a stir-fry vegetable baguette with cilantro pesto; charbroiled chicken with steamed seasonal vegetables served with vinaigrette for dipping; and chargrilled vegetarian burger made with whole grains, nuts and mushrooms, served on a toasted whole-wheat kaiser roll. The vegetarian burger, a top-selling lunch item, is running close to 15% of all burger sales, King says. In April, charbroiled Pacific coast tuna joined the light menu.

HOULIHAN'S

1991 sales: $198.2MM

400 ranking: 124

Segment ranking: 7

Houlihan's, in Chapter 11 since November, is at a critical juncture in its restructuring program.

Houlihan's nevertheless is encouraged by the economic turnaround in the Midwest and Southeast. The Kansas City, Mo.-based chain expects its strong core menu, with a few changes, to help boost its recovery.

Until last year, cheeseburgers were the biggest sellers. Now, it's the Brentwood Chicken Sandwich, a grilled breast with honey

Ground Round's pasta and grilled-tuna steak salad ($5.95) is made off-premises and tossed in-house.

mustard sauce on focaccia, first introduced two years ago. On the entree side, fajitas continue to dominate sales.

In 1991, the chain added the first in a series of value-priced items: oil-free chicken and vegetable pasta ($6.95), and shrimp linguine ($8.25). This summer, three $7.95 offerings will debut: chicken scaloppine and a pair of 9-inch pizzas (five-cheese and smoked chicken). All three come with soup or salad.

Two items from Friday's spring promotion—Pacific Coast Tuna and Chocolate Malted Turtle—have joined the permanent menu.

SPRING MENU PROMOTION
April 21 - May 18, 1992

CHART HOUSE
1991 sales: $150.0MM
400 ranking: 145
Segment ranking: 10

Chart House, Solana Beach, Calif., conducted an extensive internal marketing study that revealed that customers were more value- than price-conscious. The company then engineered a complete review of every operational facet, from its meat-cutting methods to the way employees greet and seat customers.

"We have to look very hard at what we're doing, and improve those areas that need it," notes Mike Plant, marketing communications director. "Competition comes from local restaurants, not other chains. That's become more evident than ever."

SPECIALTY RESTAURANTS
1991 sales: $141.0MM
400 ranking: 150
Segment ranking: 11

The recession affected Anaheim, Calif.-based Specialty most significantly in the Northeast, where sales were down 8% in 1991, and in California, where they were off as much as 12% in some markets.

Specialty operations stress more diverse menus with wider price options. New entrees in 1991: beef fillet medallions with cabernet sauce, sliced sirloin, and seafood and primavera pasta dishes. The 1992 offerings are even more ambitious: Chicken and pistachio fettuccine; niçoise pasta with tuna in Mediterranean-style sauce; sesame pasta with julienne cucumbers, red peppers and spicy peanut sauce; and Pacific Rim seafood entrees combined with Caribbean spices. In addition, some markets are reintroducing old standbys such as pork chops.

J.B.'S RESTAURANTS
1991 sales: $127.3MM
400 ranking: 169
Segment ranking: 12

The Salt Lake City-based chain marked its 30th year with an 11% revenue increase and the debut of J.B.'s Bakery, an in-store retail outlet featuring cookies, muffins, pecan sticky buns, and gourmet cream and double-crust pies. The $15,000 add-on installation, rolled out systemwide in June, could boost average unit sales by 5%. Goal for '92: Improve unit volume.

J.B.'s opened nine company-owned units and one franchised in 1991. Company unit expansion will be shelved in 1992 in order to concentrate on improving unit volume and profits, and to reposition J.B.'s to appeal to the more affluent baby-boomer audience.

The company's successful dinner program—now 40% of business—has prompted a shift to morning hours and tests of "nontraditional or gourmet breakfasts."

The company acquired an interest in Americana Entertainment Group and will develop 12 Home Town Buffets (average unit volume: $2

continued on page 120

DINNER HOUSES
$5.2 billion

4.6% of all
400 commercial sales

TOP TRENDS

- ☐ Value pricing and enhanced plate presentation
- ☐ More personalized service
- ☐ De-emphasizing new product introductions
- ☐ Expanding menu with lower price-range options
- ☐ Stepping up couponing
- ☐ Scaling back special price promotions
- ☐ Empowering employees

WHAT'S NEW

- ☐ Houlihan's: Chicken sandwich now outsells cheeseburger
- ☐ Chart House: Teriyaki top sirloin
- ☐ Specialty Restaurants: Fillet medallions cabernet
- ☐ J.B.'s upscale pasta line and gourmet breakfasts

NEW CONCEPTS

- ☐ J.B.'s: J.B.'s Bakery, an in-store retail bakery, rolled in June
- ☐ Magic Pan: Milano Italian Kitchen; four open, 10 more planned
- ☐ Entertainment One: True Luck's steak and crab house, Houston

Entertainment One hopes to expand True Luck's, a steakhouse, to 20 urban markets.

continued from page 117

million) in Arizona, New Mexico, Colorado and Utah over the next three years.

RESTAURANTS UNLIMITED
1991 sales: $69.9MM
400 ranking: 250
Segment ranking: 22

Same-store sales dipped about 3.7% and customer counts, 5% for 1991. The company had fair to good results in Hawaii, Alaska and Minneapolis, while Seattle, San Francisco, Los Angeles and Philadelphia units reported mixed or softened sales levels.

Currently, however, the company reports that all restaurants are posting modest to good sales increases.

Price cutting is not in the cards. The company is changing the menu mix, however, to include lower-priced pasta, salad and entree choices. New additions will be assembled from the R&D department's existing in-house recipe inventory.

Restaurants Unlimited will build four or five more Zoopa units in the Seattle area. The two-year-old, 7,000-square-foot, one-price soup-salad-pasta operation will be scaled down to contain operating costs.

Applebee's Frozen Sensation drinks (Strawberries 'n Cream and Banana Cream Pie) are part of a six-category summer beverage menu.

TRADER VIC'S
1991 sales: $57.5MM
400 ranking: 276
Segment ranking: 24

Trader Vic's, San Francisco, reports its best year since 1986. Head counts jumped 50% from 1990 to 1991 and sales were up 30%, says President Didier Peyron.

Heavy discounting accounts for most of the increases. Customers who visited an average of once a month now come more often, says Peyron. "But, even though food was discounted, the average check only went down about 15% because drink orders increased," he says. Alcoholic beverages account for 30% of total sales.

Trader Vic's Bangkok unit, its first outside of the United States, opens in September. Operating contracts have been negotiated for Palm Springs, Las Vegas and Miami.

ENTERTAINMENT ONE
*1991 sales: $50.0MM**
400 ranking: 301
Segment ranking: 27

The Houston-based nightclub operator expects a flat market until 1998, when a new generation of 21-year-olds emerges, thanks to the step-up in the birth rate in 1977.

Houston business has been strong. California, however, is weak and probably will be for another year or two, says Entertainment One Vice President Chuck Badrick.

True Luck's, a 220-seat steak and crab house, opened in Houston earlier this year. The company is looking at expansion possibilities in 20 top markets.

MAGIC PAN
*1991 sales: $43.6MM***
400 ranking: 325
Segment ranking: 31

Magic Pan discounted heavily to ride out the recession. Sales, flat during 1991, jumped 5% in the first quarter of 1992.

Expansion is on hold, however. Several units will be converted to the new Milano Italian Kitchen format, the first of which opened near San Francisco last July.

The new concept, with an under-$10 menu and an average unit volume of $2.5 million, "reflects the wave of the future, which is the price-conscious menu," says Magic Pan President Michael Patel. The San Mateo, Calif.-based chain opened a fourth Milano in Glendale, Calif., in June. Plans call for another 10 by the end of 1993.

BOBBY McGEE'S
1991 sales: $41.0MM
400 ranking: 342
Segment ranking: 35

Belt-tightening at the Scottsdale, Ariz.-based chain resulted in corporate staff cuts, unit closings and elimination of human resources and marketing departments.

Domestic expansion has been shelved until the recession ends. Four units closed, including the 13-year-old Newport Beach, Calif., unit. The company is looking to the Far East for growth. Three Australian sites boast an average unit volume of $11 million. **—B.M.D.**

*Company estimate, **R&I estimate

Away-from-Home Beefeaters Keep Steakhouses in Shape

Research indicates that red-meat consumption has declined—at home. But in restaurants, beef remains a favorite. This probably explains why, in the recent economic downturn, sales in the steakhouse/barbecue segment have remained steady.

Menu-wise, upscale entrees are in—New York strip, filet mignon and lobster at Ponderosa; prime rib at Western Sizzlin'; marinated, grilled sirloin at Golden Corral. And steakhouse executives say they'll shelf discounting and couponing as the 1992 sales picture brightens.

Upscale menu items and little couponing fatten the segment's profits.

400

SIZZLER

*1991 sales: $983.6MM**
400 ranking: 30
Segment ranking: 1

Los Angeles-based Sizzler weathered a bad year contending with the bum economy and heavy competition from a market crowded with Italian, seafood and Mexican dinner houses.

Hugh Duncan, Sizzler USA president, wants to return Sizzler to its mid-'80s positioning, before its focus shifted from steak to the salad bar.

"We want to be known as a good grill restaurant, not as a steakhouse, not just as a place that serves a lot of

continued on page 128

Ponderosa's $10 steak and lobster entree soars above the chain's $6 check average.

STEAK/BARBECUE
$5.1 billion

4.5% of all
400 commercial sales

TOP TRENDS

- ☐ Higher-priced entrees to broaden demographic appeal
- ☐ Some couponing but no deep discounting
- ☐ Continued growth and more variety in food bars, for example, Mexican
- ☐ More customer interest in nutrition

NEW MENU ITEMS

- ☐ Golden Corral: Marinated sirloin
- ☐ Western Sizzlin': Prime rib on the banquet menu
- ☐ Tony Roma's: Half-slab baby back ribs
- ☐ Sonny's Real Pit Bar-B-Q: Danish baby back ribs

GREAT PROMOS

- ☐ Tony Roma's: rib-eating contest; rib-sauce recipe contest; half-slab rib dinner

*Company estimate

Chicken is big: Salads at Tony Roma's; breast entrees at Bonanza.

continued from page 125

food for a little money," says Duncan.

Duncan would not discuss menu plans except to say that major product testing is in progress. Combos will be scaled back and weak items weeded out.

PONDEROSA
*1991 sales: $744.1MM***
400 ranking: 37
Segment ranking: 2

Dayton, Ohio-based Ponderosa added a half-dozen upscale steak and lobster entrees in the $10 range, which is substantially higher than its average $6 ticket. The dinners, featuring New York strip, filet mignon and porterhouse, help Ponderosa broaden its demographic appeal as a midscale, affordable steakhouse with a wider menu price mix.

Making big waves at the Grand Buffet is the new Mexican Bar El Grande, with make-your-own chimichangas, burritos and tacos.

GOLDEN CORRAL
1991 sales: $449.0MM
400 ranking: 58
Segment ranking: 3

Early this year, Raleigh, N.C.-based Golden Corral rolled out marinated grilled sirloin. It accounted for 8% of sales in test, a good showing, especially in units where salad-bar-only orders account for 40% to 70% of sales. In February, the chain debuted two grilled seafood dishes: whitefish and scampi.

WESTERN SIZZLIN'
1991 sales: $400.0MM
400 ranking: 62
Segment ranking: 4

Dallas-based Western Sizzlin' has curbed the revenue slide that began before President Frank Carney's arrival in 1988. Since then, average store volume has jumped 22%, from $750,000 to $964,000.

Western Sizzlin' switched this year to choice-grade meat. Prime rib now augments the banquet menu because it is popular and easier to prepare than steaks. Some units feature it on their regular weekend menus. The food bar, another priority, finally has a name: County Fare.

BONANZA
1991 sales: $389.2MM
400 ranking: 63
Segment ranking: 5

Dallas-based Bonanza is concentrating on quality improvement, refining product specifications and creating innovative ways to promote new entrees. In 1991, Bonanza introduced a line of chicken breast dinners: Honey Dijon, Monterey Supreme, Teriyaki, Mexicali (with salsa and soft cheese), and Garden Chicken (topped with cheese sauce and broccoli).

New at Golden Corral: Grilled whitefish (below), grilled scampi and marinated grilled sirloin.

Western Sizzlin' put prime rib on the permanent banquet menu.

TONY ROMA'S—A PLACE FOR RIBS
1991 sales: $241.0MM
400 ranking: 100
Segment ranking: 9

Tony Roma's new $7.95 half-slab baby back rib dinner with baked potato and bread scored a hit with light eaters, especially women. Also popular: Southwestern chicken with cheese and mushrooms, and Caesar's Chicken Salad. Coming up: Sonoma Salad with batter-fried chicken strips, jicama, red pepper and honey jalapeño dressing, and Santa Fe Salad in a taco shell with chicken and honey-mustard dressing. Prime rib is in test in Texas and California.

Couponing, initiated to combat the recession, will be cut. Promotions will concentrate on the Los Angeles-based chain's 20th anniversary celebration. **—B.M.D.**

**R&I estimate

For information circle 58 ⟶

Closings, Volcanoes, Gulf War Fuel Military Menu Maneuvers

Defense cuts set the stage for food courts, automation and more.

400

Department of Defense cutbacks call for a nearly 25% personnel decrease by 1995. The downsizing has triggered the closing or, in the case of bases with multiple food facilities, consolidation of units. Despite corresponding budget reductions, the overall effect on foodservice operations will be minimal this year.

U.S. ARMY CENTER OF EXCELLENCE, SUBSISTENCE
*1991 sales: $1,400.0MM†**
400 ranking: 21
Segment ranking: 1

The Army plans to put more cooks in field installations during the next three years, acting on the belief that cook-prepared meals will provide more menu variety and create a "home cooking" feeling for soldiers.

On the menu front, customer satisfaction and nutrition remain high priorities. Menus feature expanded Oriental, Mexican and other ethnic offerings. Specialty nights promote Asian, African, regional American and Latin American cuisines.

U.S. NAVY FOOD SERVICE SYSTEMS
1991 sales: $1,045.2MM†
400 ranking: 28
Segment ranking: 2

By 1992 year-end, automated data processing equipment will be installed in more than 75% of the general messes. An automated menu planning program, designed to ease the burden on Mess Management Specialists, allows greater creativity and flexibility in menu planning.

ARMY & AIR FORCE EXCHANGE SERVICE
1991 sales: $574.2MM†
400 ranking: 41
Segment ranking: 3

The service spent the better part of 1991 refining in-house food operations such as Anthony's Pizza, Robin Hood Sandwich Shoppe and Deli, Frank's Franks, and The Chicken Loft. Menus were streamlined, training programs stepped up and more promotions initiated. Kiosks for smaller locations supplement existing pizza

continued on page 132

The services encourage troops to choose lower-fat, lower-cholesterol foods.

MILITARY
$5.0 billion

41.0% of all
400 institutional sales

TOP TRENDS

- ☐ Shift to field feeding
- ☐ Switch to computer-automated systems
- ☐ Increased availability of nutrition information
- ☐ Developing brand-name fast-food concepts
- ☐ Converting club cafeterias to food courts
- ☐ Developing kiosk versions of popular fast-food concepts
- ☐ Persuading troops to opt for lower-fat, lower-calorie foods
- ☐ Looking for smaller, adaptable pieces of equipment

MENU HIGHLIGHTS

- ☐ Army: Oriental, Mexican, African food promotions
- ☐ Army, Air Force: Pizza and Mexican kiosk additions
- ☐ Air Force: 30-day menu programs
- ☐ Marines clubs: Expanded catering operations
- ☐ Veteran Affairs: Cook-chill systems

*Company estimate; †commercial equivalent

Healthful food still a military priority.

continued from page 131

and Mexican units.

Developing more in-house food outlets, starting with the rollout of an Oriental concept, is on the service's list of things to do.

U.S. AIR FORCE MORALE, WELFARE, RECREATION AND SERVICE AGENCY

1991 sales: $300.7MM†

400 ranking: 81

Segment ranking: 4

Foodservices, formerly under Engineering and Services Center, was reassigned to MWRS to integrate foodservice with clubs, golf courses, recreation centers and other customer-service-type businesses.

MWRS currently is working on a 30-day menu—three meals and a snack each day—composed of Armed Services recipes revised to meet dietary needs for low sodium, cholesterol, etc. This menu specifies vegetable oil; skim and low-fat milk; and baked, broiled and grilled chicken and fish entrees.

U.S. MARINE CORPS

1991 sales: $280.0MM†

400 ranking: 87

Segment ranking: 5

USMC's swing to a $4.5 million automated management system begins July 1. The two-year program is expected to eliminate $10 to $15 million worth of accounting errors annually when fully operational.

Menus, some tying in with sports and nutrition, have been tailored around more reasonably priced items such as chicken, pasta, 45- to 50-item salad bars, and bagel and baked-potato stations.

DEPT. OF VETERANS AFFAIRS

1991 sales: $269.1MM†

400 ranking: 91

Segment ranking: 6

Management hopes to step up group purchasing through a potentially cost-saving "prime vendor" concept. In test: a cook-chill system and a compressed work week—more hours a day, less days a week—to stabilize a work force plagued by absenteeism and turnover. **—B.M.D.**

†Commercial equivalent

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Value Pricing and Mainstream Competition Boost Sales

Mexican chains strive to out-do other dinner houses with low-priced entrees and upscale additions.

400

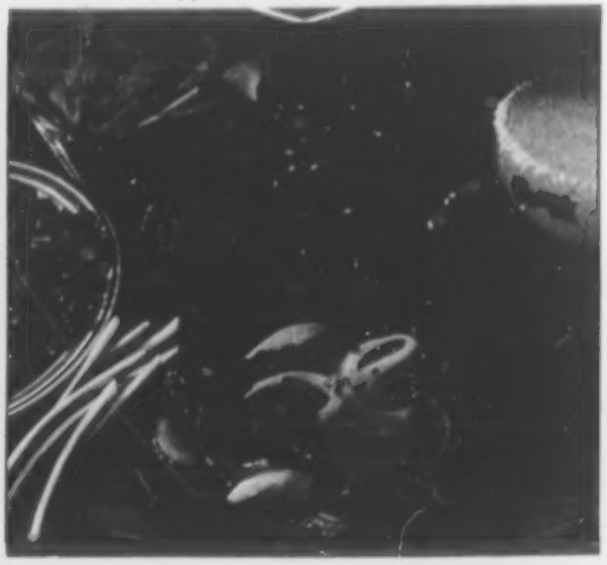
Value remains as prevalent as beans in a burrito in both fast-food and full-service Mexican restaurants. The dinner houses in the segment now supplement the menu with lower-priced entrees. On the other hand, competition from mainstream full-service restaurants that offer Mexican entrees has inspired new dishes with more complex flavors and tastes.

TACO BELL
1991 sales: $2,800.0MM
400 ranking: 8
Segment ranking: 1

Sales were up 15% in 1991, and profits, a whopping 21%. In 1991, Taco Bell opened 300 units; and expects to exceed that this year, starting with the acquisition of 95 W.R. Grace Del Taco/Taco Villa units. All will sport the familiar bell logo by early 1993. The Irvine, Calif.-based chain went south of the border in May, opening three units in Mexico City.

Taco Bell's all-new breakfast menu will be rolled out market by market throughout 1992-93. Offerings include plain, sausage and bacon burritos (39 cents to 59 cents) as well as muffin sandwiches (99 cents). Steak Burrito Bel Grande is a new addition to the lunch and dinner menu. Chicken, garden and Mexican salads, in test since mid-1991, are not expected to debut before summer.

Chi-Chi's Chajita line of skillet entrees is expanding to include appetizers served in smaller skillets.



CHI-CHI'S
1991 sales: $456.3MM
400 ranking: 57
Segment ranking: 2

According to Glenn Drasher, senior vice president, marketing/advertising for the Louisville, Ky., chain, nearly 260 competing full-service restaurants opened in various Chi-Chi's markets during 1991.

"We are trying to be more sensitive to price points," Drasher notes. "No menu

continued on page 140

MEXICAN
$4.7 billion

4.1% of all
400 commercial sales

TCP TRENDS

- ☐ New entrees appeal to mainstream appetites
- ☐ Competition from non-Mexican operations spurs new product development
- ☐ More fast-food chains sing Taco Bell's value-pricing theme song
- ☐ Product tests in retail grocery-store food courts
- ☐ Stepped-up franchising

BEST SELLERS

- ☐ Taco Bell: Taco line
- ☐ Del Taco: Macho Burrito line
- ☐ Taco John's: Soft taco
- ☐ El Torito: Fajitas

NEW MENU ITEMS

- ☐ Taco Bell: Breakfast menu including plain, sausage and bacon burritos, and muffin sandwiches
- ☐ Chi-Chi's: Pizzas, quesadiilas and nachos served in appetizer-size skillets
- ☐ Del Taco: Breakfast burrito and Macho Burrito, which weighs a full pound
- ☐ Carlos Murphy's: Chicken Caesar Salad, shark fajitas

Chi-Chi's serves appetizers, pizzas, Chajitas, and even desserts in a skillet.

continued from page 137

increases are planned, and store promotions will be limited to $5.99 to $6.99 items."

Chi-Chi's also plans to add more menu items and redesign the physical menu. The chain is testing a skillet appetizer line, an extension of Chi-Chi's trademarked Chajita skillet entrees. Selections, served in smaller skillets, consist of pizzas, quesadillas and nachos. Also new on the menu: a Vegetable Chajita and Sizzling Apple Pie in caramel sauce, both served in skillets.

Sizzling Shrimp from El Torito helps beat the non-Mexican competition, says President Mike Casey.

EL TORITO
*1991 sales: $375.0MM**
400 ranking: 65
Segment ranking: 3

Both the recession and more competition from non-Mexican dinner houses have taken their toll on El Torito's business, says President Mike Casey. Casey believes that the economy's pendulum eventually will swing back. But taking on the competition is another story.

"Our priority is to make the point that Mexican restaurants do a better job with Mexican dishes than non-Mexican dinner houses," he says. To prove the point, the chain will focus on new products.

Casey won't say what new menu offerings are in the wings. But pricing will be a factor in terms of both food and service quality. He believes that El Torito's average checks of $7 to $8 can stimulate customers' value perception if the quality is there.

DEL TACO
*1991 sales: $177.0MM***
400 ranking: 131
Segment ranking: 4

Never an active franchisor, Costa Mesa, Calif.-based Del Taco has unveiled an aggressive growth strategy to attract potential franchisees. A scaled down, 2,000-square-foot, 28-seat building design and logo, as well as multiunit development opportunities in exclusive territories all are part of the package. Under President Kevin Moriarty, the company has speeded up drive-thru, streamlined preparation and serving procedures, improved cost controls, and revamped the menu to reflect the new wave of value pricing.

Del Taco's current menu boasts 20 items under a dollar, including several in the 50-cent ballpark. New additions include a Breakfast Burrito and a Macho Burrito, which weighs in at a full pound.

CARLOS MURPHY'S
1991 sales: $38.0MM
400 ranking: 361
Segment ranking: 16

Customer counts ranged from flat to up 2%. But this year, the chain expects stronger sales because diners are trading down to less expensive menu entrees, says Bruce MacDiarmid, Carlos Murphy's marketing vice president.

The chain's newest offering, Chicken Caesar Salad, accounts for 40% of all salad sales. Shark fajitas sell well because the fish is grilled instead of fried. All sandwiches are served on tortas (Mexican rolls). The children's menu, 6% of all meals, is expected to take off when the chain introduces more "Kid Friendly" promotions. **—B.M.D.**

Chicken wings, salads and sandwiches—this one's from Taco John's—keep joining Mexican menus.

*Company estimate; **R&I estimate

Sandwich Chains Target Budget Buyers and Quality Seekers

Sandwich chains draw two kinds of customers, chain executives say. One group is willing to pay a slightly higher price for what they perceive to be a top-notch sandwich. The other group is drawn by the low price first—following the fast-food value mind-set created by Taco Bell. Chains direct their marketing efforts to one group or the other.

Sandwich sellers say there's plenty of share to carve from the burger segment.

400

ARBY'S

1991 sales: $1,450.0MM
400 ranking: 19
Segment ranking: 1

In May, Miami-based Arby's launched yet another promotion supporting its new position as a delicious change from everyday fast food. Arby's "Great Escape from Boring Burgers" campaign spotlights the chain's four major sandwich lines: roast beef, chicken, light sandwiches and Arby's new sub sandwiches, which debuted in April.

The chain's Great Escape promotion includes a giveaway sweepstakes advertised through free-standing inserts and on soft-drink cups with "peel and reveal" prize stickers. Arby's plays up its

continued on page 148

Arby's new line of sub sandwiches includes Italian, meatball, turkey and roast beef.

SANDWICHES
$4.5 billion

4.0% of all
400 commercial sales

TOP TRENDS

- ☐ Value deals: Round sandwiches, 79 cents to $1.39, at Subway; Rax Favorites for 99 cents
- ☐ Continued expansion into nontraditional markets, including colleges, hospitals and sports facilities
- ☐ Marketing geared toward customers willing to spend more for better quality
- ☐ Private labeling of such items as meat, cheese, bread, potato chips and dressings to lower food costs
- ☐ More light products, especially vegetarian selections, salads and grilled items

NEW MENU ITEMS

- ☐ Arby's: Sub sandwiches
- ☐ Subway: 4-inch round sandwiches
- ☐ Rax: Fresh pizza and pasta on the salad bar in test
- ☐ Schlotzsky's: "Deli" concept, complete with expanded menu and new decor

Schlotzsky's New Orleans-style deli posts twice the sales of a regular store.

continued from page 145

international presence by offering grand-prize winners a week-long vacation for two to any Arby's location in the world, including Hawaii, the Bahamas, the Virgin Islands and Mexico City.

SUBWAY

1991 sales: $1,400.0MM
400 ranking: 20
Segment ranking: 2

Subway, Milford, Conn., is rolling out its new 4-inch round sandwiches to all stores, says Marketing Vice President Dick Pilchen. It will begin advertising the sandwiches, priced from 79 cents to $1.39, in September.

Over the past year, Subway has cut its entry-level price, promoting 6-inch sandwiches at $1.89, then $1.69, and most recently $1.49. Pilchen says the chain will give its price-oriented marketing a rest this summer during the launch of a new roast-chicken sandwich, which will debut at $2.49 for a 6-inch size.

RAX

1991 sales: $220.8MM
400 ranking: 111
Segment ranking: 4

Columbus, Ohio-based Rax might be jumping on the value bandwagon a little late, but chain executives believe the deals will more than make up the delay. Eight full-size Rax favorites, including its original roast beef sandwich (ordinarily $1.69), sell for 99 cents. The value menu went systemwide in April 1992.

Rax debuted its Favorites Value Menu of best sellers for 99 cents. Pizza and pasta are new to the salad bar.

Pizza, baked in view of customers, and pasta on the salad bar are in test in five Columbus units. The agreement to convert 100 Rax units to Miami Subs is proceeding on schedule. (See Miami Subs, following). In a similar venture with a hometown Mexican chain, Red Burrito, Rax will open 20 of the units over the next two years.

SCHLOTZSKY'S

1991 sales: $60.0MM
400 ranking: 269
Segment ranking: 12

John Wooley, president, brought Chef Mike Dyer on board in 1991 to help reposition the concept—and major changes resulted. Dyer's test unit, Schlotzsky's Deli in Houston, was modeled after New Orleans' Central Grocery, where the muffuletta sandwich was born. The unit grossed about $700,000 in 1991, more than double typical unit volumes of $300,000 for the Austin, Texas-based chain.

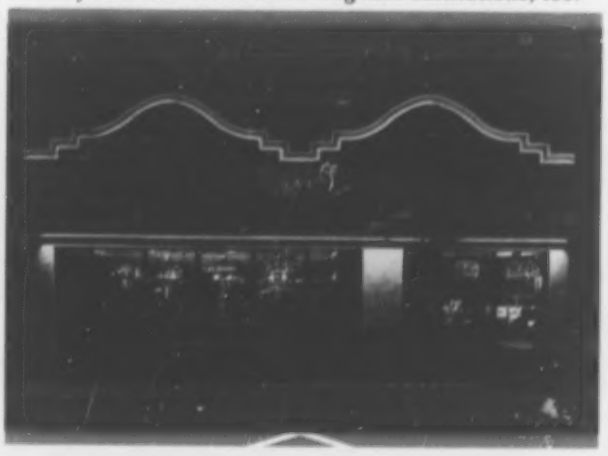
More than 20 area developers are signed up to open units, and the chain expects another 30 to open by the end of this year.

MIAMI SUBS

1991 sales: $39.0MM
400 ranking: 354
Segment ranking: 17

A joint venture with Rax signed late in 1991 will convert 100 Rax units in Ohio, Indiana, Missouri, West Virginia and Pennsylvania to Miami Subs by 1996. Half the units to be converted will be Rax company stores, the other half will be new sites and franchisees who agree to convert. Why the deal? When Miami Subs, Fort Lauderdale, Fla., took over closed Rax sites in Florida, average unit volumes doubled, says Ron Petty, Miami Subs president. **—B.L.**

Miami Subs will take over 100 Rax sites over the next five years. The chain is moving into institutions, too.



Seafood Chains Lure Customers with Value and Health

Dinners, combos, grilling and broiling provide competitive edge.

400

Leading seafood chains continue to develop and promote value menus, luring recession-weary customers to their establishments with complete meals. Fish, shellfish and chicken combo platters also are proving successful in persuading customers to dine out.

After value, health is the next most common theme. Leading seafood chains are expanding baked, grilled and broiled seafood lines, and offering chicken as a seafood alternative, also prepared baked, grilled or broiled.

Although battered, fried seafood still is the top seller, seafood chain operators say offering baked, broiled and grilled lines is necessary in today's market, and will be a vital competitive edge in the future.

New menu boards and backlit boxes have increased Long John Silver's overall sales by more than 10%.

RED LOBSTER

*1991 sales: $1,600.0MM***

400 ranking: 15

Segment ranking: 1

Value, service and expansion into smaller markets are key components of Red Lobster's continued success as the seafood segment leader.

The Orlando, Fla.-based dinner-house chain is opening units in markets with populations of 150,000 or less. The chain plans aggressive growth in these markets, in addition to its traditional pursuit of markets in areas with populations of more than 150,000.

Red Lobster, part of General Mills Restaurants, continues to market value and service through its garlic cheesebread program. Servers offer customers unlimited garlic cheesebread in table baskets.

The company's value menu, with a variety of entrees priced at $9.95, remains a long-term test in a five-market area. Value menu entrees are priced at $9.95. *continued on page 154*

SEAFOOD
$3.0 billion

2.6% of all
400 commercial sales

TOP TRENDS

- ☐ Value menus, value meals
- ☐ Baked, broiled or grilled fish and chicken items
- ☐ Fish, shellfish and chicken combo platters
- ☐ Emphasis on service

NEW MENU ITEMS

- ☐ Long John Silver's: Add-a-Piece menu
- ☐ C.A. Muer: Whole bass or perch baked in salt and presented tableside
- ☐ Red Lobster: Unlimited garlic cheesebread in table baskets, value menu
- ☐ Captain D's: Value menu featuring five seafood and seafood/chicken dinners
- ☐ Legal Sea Foods: Value dinners and buffets offering fish, starch, two side dishes, coffee and dessert
- ☐ Arthur Treacher's: More broiled, baked and grilled fish and chicken items

**R&I estimate

continued from page 151

Captain D's is trying to net customers by promoting combo platters.

LONG JOHN SILVER'S SEAFOOD SHOPPES

1991 sales: $835.0MM
400 ranking: 43
Segment ranking: 2

Long John Silver's strategy to revitalize sales began with menu analysis. The Lexington, Ky.-based company eliminated many items, redesigned its menu boards and developed the Add-a-Piece program, in which, for 75 cents or less per piece, customers can add pieces of fish, shrimp or chicken to their basic meal. The basic meals sell for $1.99.

CAPTAIN D'S

1991 sales: $420.8MM
400 ranking: 60
Segment ranking: 3

The past year saw new leadership for Captain D's, a division of Shoney's Inc. Chuck Porter, formerly president of Shoney's commissary and distribution arm, is the new president. Vearl Starnes, formerly president of Lee's Famous Recipe Chicken, another Shoney's property, is the new executive vice president. The two are noted for record sales and profits with their previous jobs, and are expected to bring the same success to Nashville-based Captain D's.

The chain also has developed a new long-term positioning statement, "The Great Little Seafood Place," and is concentrating on marketing combo dinners. The newest promotion is a value menu featuring five complete meals for $2.99.

SKIPPER'S

1991 sales: $100.5MM
400 ranking: 192
Segment ranking: 4

This year, Skipper's, the Bellevue, Wash., full-service chain, has seen the launching of a new concept, Skipper's Seafood Broiler, and the purchase of 20 Long John Silver's stores in Colorado. About half of the Colorado stores purchased are open and operating as Skipper's units.

Skipper's, owned by National Pizza, Pizza Hut's largest franchisee, has 16 Seafood Broilers in developmental stages. Some are new, and some existing Skipper's restaurants are being converted. The new concepts have drive-thru service, are larger and no longer have Skipper's nautical interior.

LEGAL SEA FOODS

*1991 sales: $49.0MM**
400 ranking: 305
Segment ranking: 7

Value programs highlighting consistency and quality of specially priced seafood dinners played a role in Legal Sea Foods' 6% sales increase over last year, officials say. Value dinners and buffets, offered on various nights at the company's eight metro-Boston locations, were promoted with a series of radio advertisements. Priced from $6.95 to $12.95, the dinners include fish, starch, two side dishes, coffee and, in some cases, dessert.

ARTHUR TREACHER'S

1991 sales: $38.0MM
400 ranking: 360
Segment ranking: 8

A strategy to put new stores in shopping-mall food courts has paid off for Arthur Treacher's Fish & Chips. The Youngstown, Ohio-based chain credits its growth to operating in small spaces and filling in with free-standing units.

Much of the expansion is occurring in Florida, as well as Atlanta and Cincinnati. Franchised units have increased by 20 in Atlanta alone. **—Karen Straus**

Captain D's is promoting a value menu featuring five complete meals that include fish, shellfish and chicken combos.

*Company estimate

Transportation Targets Markets with Tailored Meals

Foodservice aims to please all—from business travelers to the health-conscious.

The transportation segment is increasingly using foodservice as a method of courting its target markets. More business, first-class and even child travelers can find convenience, luxury and fun at meals offering more healthful food.

CATERAIR INTERNATIONAL
1991 sales: $1,049.0MM
400 ranking: 27
Segment ranking: 1

Caterair International, Potomac, Md., leads this year's ranking—even with a steep drop in sales from 1990. In 1991, Caterair won 66 new contracts worldwide worth more than $58.0 million.

Caterair now offers more lighter fare. At breakfast, customers can choose a bran muffin with fruit and yogurt or an omelet. Second meals on longer flights are cold plates, such as pasta salad.

UNITED AIRLINES
1991 sales: $550.0MM
400 ranking: 44
Segment ranking: 2

United Airlines, Elk Grove Village, Ill., leaps to second place from fourth in the segment ranking. Menu changes include Friendly Skies Meals for kids (a joint effort with McDonald's) and Connoisseur Class for international business travelers, offering a choice of three entrees, an international wine list and other amenities.

DOBBS INTERNATIONAL SERVICES
1991 sales: $500.0MM
400 ranking: 53
Segment ranking: 3

Like Caterair, Dobbs' is offering more healthful food. Customers snack on pretzels instead of peanuts. At lunch, broth-based soups are replacing heavier cream soups. Menus now contain more grilled chicken and fish.

NORTHWEST AIRLINES
*1991 sales: $32.0MM***
400 ranking: 400
Segment ranking: 7

Minneapolis-based Northwest Airlines introduced two major menu innovations in 1991: Japanese Meal Presentation for first and executive classes and Fastrak for travelers on the busy Minneapolis-Chicago route (see sidebar). The Japanese Presentation service offers an artfully presented seven-course Japanese menu. —B.M.

Japanese Meal Presentation is an elegant lure for first- and executive-class travelers on Northwest Airlines.

**R&I estimate

TRANSPORTATION
$2.8 billion

23.0% of all 400 institutional sales

TOP TRENDS

- Healthful food—either replacing a heavier meal or offered as a choice along with it
- Upscale meals such as Northwest's Japanese Meal Presentation and United's Connoisseur Class
- Targeting the business traveler with both efficient and amenity-filled meal service

GREAT IDEAS

- United Airlines: "Do Not Disturb/Wake Me for Meals" stickers for fliers' optional use
- Northwest: Pick-and-pack Fastrak service enabling passengers to pack their own meals from a gate-area buffet and eat them wherever and whenever they want
- Amtrak: Hand-held menu, which replaces a check-off sheet and improves customer perception of quality

C-Stores Refresh Units, Menus and Merchandising Techniques

Customer-friendly redesigns help c-stores meet evolving needs.

400

Each of the five companies in the c-store segment is in the process of upgrading its units. In some companies, foodservice plays a more important role than in others.

7-ELEVEN

*1991 sales: $1,996.9MM***
400 ranking: 13
Segment ranking: 1

After only four-and-a-half months under Chapter 11, The Southland Corporation, which owns 7-Eleven, completed its bankruptcy reorganization in March 1991. Under the agreement, Ito-Yokado and Seven-Eleven Japan bought 70% of Southland's common stock.

With this financing, 7-Eleven now is testing a 50-unit prototype market in Austin, Texas. The units have undergone changes that include new products and competitive pricing with many supermarket items.

Fresh sandwiches and salads are made and delivered daily to the area stores from 7-Eleven's new commissary.

CIRCLE K

*1991 sales: $213.3MM***
400 ranking: 115
Segment ranking: 2

Phoenix-based Circle K Corporation filed its reorganization plan with the U.S. Bankruptcy Court in March 1992 after filing for bankruptcy in May 1990. The plan outlines provisions to lead Circle K out of Chapter 11 over a five-year period.

Part of the plan includes closing unprofitable stores (779 in 1991) and reinvesting in the remaining stores through modernized foodservice equipment and fountain areas.

WAWA

1991 sales: $139.9MM
400 ranking: 154
Segment ranking: 3

Wawa introduced a prototype store—Wawa's Store of the '90s—in November 1991. The store was designed for maximum efficiency and service, say executives for the Wawa, Pa.-based company.

The company will use the model, which groups merchandise by purchasing occasion, in the redesign of 70 more Wawa stores in 1992. Beverage and snack items are placed together, for example. —B.M.

Wawa's deli facilities generate more than 50,000 sandwiches daily systemwide.

**R&I estimate

CONVENIENCE STORES $2.5 billion

2.2% of all 400 commercial sales

TOP TRENDS

- ☐ Upgrading stores
- ☐ Emphasizing deli sandwiches
- ☐ Creating prototype stores as test units
- ☐ Targeting baby boomers
- ☐ Redesigning stores to get customers in and out more quickly

BEST PROMO

Wawa had the hoagie declared the official sandwich of Philadelphia through a promotion that secured 30,000 signatures to support the designation. The company celebrated by building a 500-foot hoagie on Hoagie Day, May 6, 1992. More than 100 Wawa employees participated in the event, 30 of which built the sandwich within six hours. Wawa, the largest hoagie retailer in the market, makes more than 174,000 hoagies weekly in its 485 convenience stores.

Cafeterias Battle To Keep Hold on Customers

Meal deals, ad campaigns and new designs keep patrons interested.

400

Squeezed at one end by the price-sensitive casual-dining segment and at the other by the value-crazy fast-food segment, cafeterias are struggling to retain market share.

With the exception of Morrison's and Luby's, the leaders in the segment report slumping sales and profits. For example, Piccadilly Cafeterias reported a net loss of $28.8 million for its fiscal third quarter ending March 31.

Most cafeteria operators are responding by increasing their presence in the advertising arena and with ploys such as all-you-can-eat programs. Morrison's is testing off-premises catering, while others are going back to the basics of the business.

LUBY'S CAFETERIAS

1991 sales: $330.4MM

400 ranking: 71

Segment ranking: 1

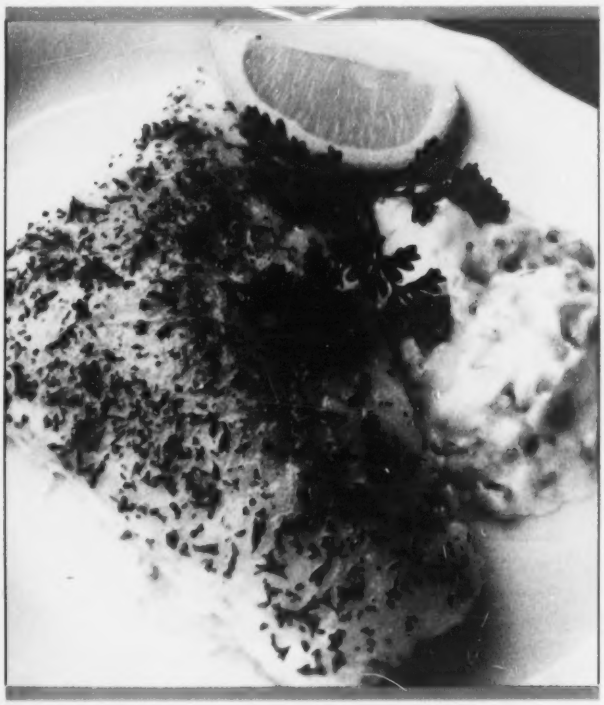
Luby's is the exception to the rule among cafeterias as it continues to expand, primarily in the South and the Midwest. The San Antonio-based chain will open 12 cafeterias this year.

For the first time in 15 years, the chain is considering an extensive television advertising campaign, according to Director of Marketing Vernon Schrader.

The menu remains virtually the same, although some items continue to receive more customer attention. For example, pasta entrees such as lasagna, fettuccine Alfredo and spaghetti are growing in popularity.

The cafeterias customarily take up 11,000 square feet. Since a test of a smaller unit saved money without hurting operational efficiencies, all new units will be about 10% smaller than the original. *continued on page 166*

One of Luby's most popular entrees, the baked whitefish (haddock or cod) sells for $4.49.



CAFETERIAS
$1.8 billion

1.6% of all
400 commercial sales

TOP TRENDS

- ☐ Pasta! Pasta! Pasta!
- ☐ More vegetables and salads to meet demand for more healthful items
- ☐ Smaller buildings
- ☐ Conversions from straight line to scatter-system buffets

COMING UP

- ☐ Furr's: Expanding specialty restaurant group by converting struggling cafeterias into El Paso BBQ and Zookinis concepts
- ☐ Luby's: First extensive national television advertising campaign in 15 years

SALES STIMULATORS

- ☐ Morrison's: Testing off-premises catering at two units in 1992
- ☐ Furr's: All-you-can-eat price program
- ☐ Wyatt's: Coupons offering two entrees for the price of one
- ☐ MCL Cafeterias: "Hometown" entrees in $1.69 price range

continued from page 165

Furr's is concentrating on expanding its specialty concepts in '92.

MORRISON'S CAFETERIAS
*1991 sales: $306.4MM**
400 ranking: 80
Segment ranking: 2

To generate more income for its already-stable business, Morrison's is testing smaller cafeterias for smaller markets. Two scaled-down units will open this year.

Because kitchens account for 40% of the space in a typical Morrison's unit, the company also is looking for ways to sell more food at existing units. Four programs, including off-premises catering, are being tested to enhance sales.

Despite the tests, Morrison's is relying on its specialty dinner-house and contract management divisions for growth. "We do not see the cafeteria concept today as a growth vehicle for Morrison's," says E. Eugene Bishop, chairman and chief executive officer of Mobile, Ala.-based Morrison's.

PICCADILLY CAFETERIAS
*1991 sales: $275.0MM**
400 ranking: 89
Segment ranking: 3

After several quarters of uneven sales and declining profits, the Baton Rouge, La.-based chain has named a new president and adopted a back-to-basics philosophy.

"We're going against the flow in the cafeteria segment," says Director of Marketing Brian VonGruben. "The other players are changing their image and promoting meal deals. We absolutely are not doing that. We think the solution is to emphasize quality food, at a fair price, with a simple cafeteria-style operation."

The 48-year-old chain will place great emphasis on expansion in 1993, according to VonGruben, and is beginning to examine sites for expansion. New units are under construction in Memphis and Atlanta.

FURR'S CAFETERIAS
*1991 sales: $216.0MM***
400 ranking: 113
Segment ranking: 4

The beleaguered Lubbock, Texas-based chain is trying to change its fortunes with a new president and a new direction.

William Prather, former president of Hardee's Food Systems, was appointed president of the 142-unit chain in February. Once Furr's succeeded in restructuring a $170 million debt, Prather announced a change in advertising agencies and a new campaign to battle the fast-food value menus.

On April 1, the "All You Can Eat, All the Time" advertising campaign debuted. Two TV spots use humorous cafeteria-style scenes to drive home the chain's new fixed-price philosophy. Meal prices at all cafeterias now range from $4.99 to $5.49.

Furr's also is expanding its specialty restaurants, converting struggling cafeterias into casual-theme concepts called El Paso Barbeque and Zookinis. El Paso specializes in steaks and Southwest cooking and offers a full bar. Zookinis specializes in soup, salad and grilled items. It also serves beer and wine.

Director of Marketing Ken Turner says as many as 12 cafeterias could be converted to Zookinis or El Paso this year.

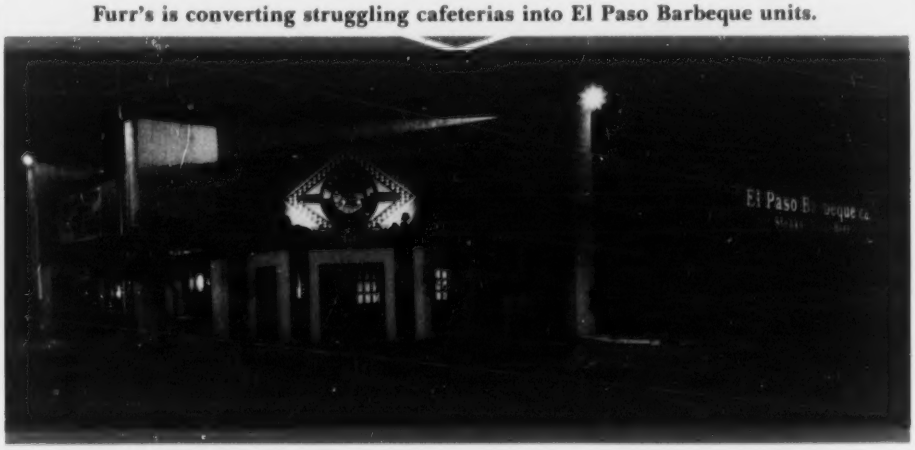
OLD COUNTRY BUFFET
*1991 sales: $207.0MM***
400 ranking: 120
Segment ranking: 5

For the eighth consecutive year, the Eden Prairie, Minn.-based chain posted record sales and earnings. Sales increased 35% and net earnings increased 39% to $11.1 million.

The chain has spent more than $25 million opening 20 company stores and converting 10 straight-line buffets to scatter systems. This year, the company plans to open 30 to 35 new units and convert eight to 10 more stores to the scatter system.

Chairman Roe Hatlen says spending in marketing increased 70% in 1991. Because of the success of that strategy, about 1.25% of sales will be directed to marketing in 1992. —J.W.

Furr's is converting struggling cafeterias into El Paso Barbeque units.



*Company estimate; **R&I estimate

Health-Care Chains Shuffle Assets in Quest for Profits

Financial machinations affect directors more than menus and patients.

Changing government regulations aren't the only thorns in the side of health-care foodservice departments. Most major chains still are dealing with the aftermath of expansion, buyouts and other assorted activities of corporate America in the 1980s and early '90s.

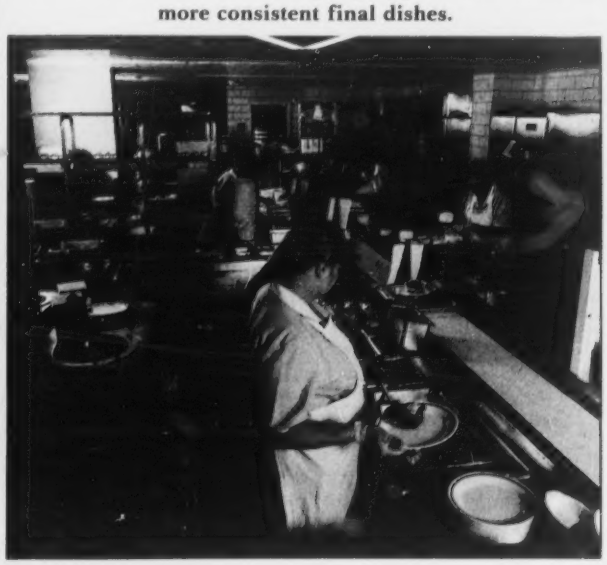
Health-care foodservice managers, more than patients, have felt the impact of this disruption and uncertainty. One long-time foodservice director who works for a large chain has had four different administrators in the last five years and says that he's getting tired of yearly adjustments to new managements' demands and priorities.

And rising debt service (or financial self-interest in the case of LBOs) puts more and more pressure on all hospital departments, not only to raise revenue but also to cut costs. Departments are being consolidated and hospitals are taking over each other in an attempt to increase efficiencies.

Yet not all the news is bleak. Many hospitals are focusing on their profitable businesses, such as outpatient services. With added dollars, they're expanding and/or retiring debt.

What about menus? In most cases, they're decided by divisions or at unit levels. As a result, food trends tend to mirror those of the nation as a whole with allowances made for regional tastes.

Health-care chains find that pre-prepped foods result in more consistent final dishes.



UNITED HEALTH

1991 sales: $252.0MM†

400 ranking: 94

Segment ranking: 1

For increased consistency and efficiency, this Milwaukee-based company is implementing a prep-less kitchen concept using precooked, presliced and preportioned meat products of its own design.

The company also is instituting an employee empowerment program, which is

continued on page 172

HEALTH CARE
$1.6 billion

13.1% of all
400 institutional sales

TOP FOOD TRENDS

- ☐ Healthful meals such as grilled chicken
- ☐ Build-your-own meals such as hamburgers with toppings
- ☐ Ethnic meals, including taco salads
- ☐ Increased variety of baked goods
- ☐ More pre-prepped foods for greater consistency in final menu items

CORPORATE TRENDS

- ☐ Continued financial machinations affect directors more than the food they serve
- ☐ Increased emphasis on profitable divisions such as outpatient services
- ☐ Further consolidation of departments and trimming of corporate staffs
- ☐ Selective purchase of geographically desirable and profitable operations
- ☐ Expansion into ancillary services such as insurance and pharmacies
- ☐ Implementation of empowerment programs

†Commercial equivalent

Profitable services such as pharmacies help chains expand and retire debt.

Employees continue to make up the majority of meals. This AMI facility stresses cheerful service to encourage business.

continued from page 171

being well received, says Wayne Goldman, corporate director of foodservice.

BEVERLY ENTERPRISES
*1991 sales: $239.5MM†***
400 ranking: 102
Segment ranking: 2

Due to increases in Medicaid patient rates and an increase in Medicare revenues primarily as a result of increased ancillary services, census and patient rates, Pasadena, Calif.-based Beverly saw revenue jump 11% in the first quarter of 1992 to $613,394,000, up from $551,501,000 for the first quarter of 1991.

NATIONAL MEDICAL ENTERPRISES
*1991 sales: $224.0MM†***
400 ranking: 109
Segment ranking: 3

In an attempt to continue to improve the financial and operating performance of its Psychiatric Hospital division, NME plans to sell, convert or close some of its 88 psychiatric hospitals and substance-abuse treatment centers.

The Santa Monica, Calif.-based company will centralize its principal health-care operations and strengthen its Psychiatric Hospital division to compete more effectively in this increasingly competitive segment.

The company also is rapidly expanding its outpatient and partial-hospitalization programs.

HOSPITAL CORP. OF AMERICA
*1991 sales: $142.8MM†***
400 ranking: 149
Segment ranking: 5

There's no doubt that CEO Thomas Frist is doing something right at this Nashville, Tenn.-based company. To thwart takeover attempts in 1987, he sold 104 smaller hospitals and bought back some of the company's stock. Two years later Frist took HCA private in a $5.1 billion buyout. He cut costs dramatically, saving almost $70 million annual.

During this time, the company spent $500 million, most on expanding outpatient facilities, which are generally more profitable than inpatient facilities.

The company exceeds industry averages with a 21% profit margin in its acute-care facilities.

Earnings for 1992 look good. All this means Frist plans to cash in on his management expertise by selling some of HCA to investors.

HUMANA
1991 sales: $112.0MM†
400 ranking: 182
Segment ranking: 6

On April 1, a subsidiary of Humana acquired 63,000-member HealthChicago Inc., bringing membership in the Humana Health Care Plan in the Chicago area to more than 300,000. The company owns and operates 79 hospitals.

MANOR HEALTHCARE
*1991 sales: $73.8MM†**
400 ranking: 237
Segment ranking: 8

Last year, seven new skilled nursing and rehabilitation facility centers were opened in the Washington, Philadelphia, Chicago, San Francisco and Tampa, Fla., areas.

The company plans to continue to focus on creating a stable and motivated work force by implementing a number of new human resource initiatives such as its "Employer of Choice" program.

The company also will be implementing a new customer satisfaction measurement system, a new compensation system linking incentive pay to levels of customer satisfaction ratings, and new training and education programs to improve customer-service training.

NATIONAL HEALTHCORP
1991 sales: $42.0MM†
400 ranking: 338
Segment ranking: 15

Murfreesboro, Tenn.-based National Healthcorp., which operates 84 health-care centers with a total of 10,424 beds, has its eyes on expansion. In mid-May, the company privately placed $30 million in convertible debt. Proceeds will be used to build more health-care centers in the Southeast and finance other properties.

Foodservice is increasing its emphasis on patients/residents as customers. In the coming year, the company plans to include patients and their families more in meal planning, says Augusta Walker, coordinator of dietary services. There also will be an emphasis on increasing restaurant-style service in a number of the company's nursing homes. **—Susie Stephenson**

*Company estimate; **R&I estimate; †commercial equivalent

Inmate Census Leaps Dramatically; Dollars Don't

Shrinking budgets severely restrain the fastest-growing segment.

400

The numbers are no less than staggering. The California prison system is running at almost 200% capacity. In some states, double-bunking is a fact of life. In fact, the correctional market has the fastest-growing population of any institutional foodservice segment.

But while inmate population is rapidly increasing, that's not true of the foodservice dollars being spent.

For example, the average population of the Los Angeles County jail district increased 31% from 1987 to 1989. During the same time, New York City's was up 52.9%, and Dallas County, Texas, more than 100%. Yet funds to correctional institutions are dwindling as federal and state governments continue to cut budgets. In some states, money is so tight that new prisons, for instance, the Union Correctional Institution in Raiford, Fla., are not opening.

Other government-funded institutions face similar situations, which are unlikely to improve any time soon.

CALIFORNIA DEPARTMENT OF CORRECTIONS
1991 sales: $288.4MM†
400 ranking: 85
Segment ranking: 1

The California system is 180% over capacity, says Food Administrator Don Barker. And with a state budget that is millions in the red, his staff has been cut and his challenge is to make better purchasing deals. Items popular with inmates include burgers, chicken and chicken-fried steak (made with tenderized rounds).

FEDERAL BUREAU OF PRISONS
1991 sales: $155.1MM†
400 ranking: 142
Segment ranking: 2

Nutrition information—that's one emphasis of the foodservice department of the Federal Bureau of Prisons. Nutrition information cards—with the amount of calories, fat, sodium and cholesterol per serving—now are placed on serving lines. This year, all federal institutions will implement a recycling program. In addition, the bureau is creating a master schedule for replacing major equipment. Standardized policies and procedures will permit replacements on a timely basis with appropriate funding ensured.

MICHIGAN DEPARTMENT OF CORRECTIONS
1991 sales: $81.9MM†
400 ranking: 223
Segment ranking: 7

There's double-bunking in this system, which means that the foodservice facilities are producing two-and-a-half times more food than they were designed to prepare. "The physical wear and tear on the equipment is tremendous," says Foodservice Administrator Gatha McClellan.

Yet here, as across the industry, there's been an emphasis on more healthful eating. For example, a switch to a 50-50 turkey-beef product has saved dollars and reduced the fat content of meals. Eggs are offered only once a week; skim milk and margarine are available. "We're trying to help inmates stay within 30% of their calorie consumption from fat and 300 milligrams of cholesterol," says McClellan. —S.S.

INSTITUTIONS
$1.5 billion

12.3% of all
400 institutional sales

TOP FOOD TRENDS

- ☐ Burgers
- ☐ Chicken-fried steak
- ☐ Boneless hams and turkeys to help control yield and portion size
- ☐ Skim milk
- ☐ Variety of more healthful offerings
- ☐ More beverage choices at meals
- ☐ From-scratch cookies

TOP CHALLENGES

- ☐ Cuts in government commodities
- ☐ Severe overcrowding
- ☐ Budget cuts
- ☐ Staff cuts
- ☐ Getting taxpayers to care about the well-being of market customers
- ☐ Implementing more bulk-purchasing programs to reduce costs

COMING UP

- ☐ Further computerization to tighten inventory controls
- ☐ More regional and statewide purchasing agreements

†Commercial equivalent

Tightening Budgets Continue To Buffet School Foodservices

Bigger, more interesting menus attract more customers and increase revenues.

400

Presidential candidates espouse the merits of overhauling the nation's education system. The president of Yale University decides to leave this prestigious university to help Christopher Whittle, of Channel One fame, create a national private-school system. Columbia University struggles to determine what cuts to make to take out more than $72 million from its $1 billion budget.

There's no doubt about it. Schools everywhere are finding dollars harder and harder to come by, particularly as state budgets get tighter.

Whether foodservice departments are operating in the red or black, they're being asked to contribute to general funds as well as cover all their expenses.

As financial pressures continue to mount, school foodservices in big and small districts are looking for ways to shave dollars from their expenses and add dollars to their sales. The same is true for most colleges and universities.

As a result, the foodservice departments of educational institutions are using labor more efficiently; costing out menu items more accurately; marketing more aggressively; and depending on databases to track trends. While some have brought in branded food, the decision has not been universal.

Many schools are trying to increase participation by adding and promoting breakfast programs, and by contracting out more of their services. Day-care centers seem to be the new market of choice.

Promotions have helped increase breakfast program participation in the Chicago Public Schools.

NEW YORK CITY BOARD OF EDUCATION

*1991 sales: 363.9MM†**
400 ranking: 67
Segment ranking: 1

Popular menu items with New York City schoolchildren include oven-baked, grilled chicken patties and

continued on page 180

*Company estimate; †commercial equivalent

EDUCATION
$1.3 billion

10.7% of all
400 institutional sales

TOP FOOD TRENDS

Schools

- ☐ Pizza for breakfast
- ☐ Juice drinks (a fruit component equivalent)
- ☐ Waffles
- ☐ Foods on a stick—French toast, cheesecake, hot dogs, etc.
- ☐ More a la carte offerings

Colleges and universities

- ☐ Stir-fries
- ☐ Poultry dishes
- ☐ International foods—particularly Thai

TOP STRATEGIC TRENDS

- ☐ Closing facilities
- ☐ Tightening meal-per-labor-hour ratios
- ☐ Costing menus more accurately
- ☐ Adjusting staffing formulas
- ☐ Expanding market
- ☐ Upgrading services
- ☐ Increasing participation through promotions

Schools are adjusting menus to meet the new dietary guidelines.

continued from page 179

Jamaican beef patties, in addition to such standard favorites as pizza, fish and hamburgers.

Joining the menu over the next year will be vegetable lasagna; chicken meatballs; chicken burritos; a turkey, ham and cheese sandwich with fewer than 400 milligrams of sodium; turkey chili; and two new rice dishes—rice pilaf and chicken and rice.

The emphasis this fall will be on training, in both food preparation and sanitation. Because of budget cuts, employees now are cross-trained so they can perform myriad foodservice functions.

LOS ANGELES UNIFIED SCHOOL DISTRICT

*1991 sales: $245.6MM†**
400 ranking: 97
Segment ranking: 2

Los Angeles is reducing expenses by adjusting the staffing formula for cafeterias. The changes will hold hours earned to 1989-90 levels even though both enrollment and participation have increased, says Assistant Deputy Director Carol Noelting. The same has been done with custodial and supervisory staff.

The department plans to expand its services by providing foodservice at 91 child-care centers operated by the district's Child Development Division. Foodservices will manage foodservice for these centers, formerly serviced by CDD staff. The department will offer breakfast, lunch and snacks at no charge to children.

Pizza, tacos and burgers are popular menu items with the district's customers. The district expects to add a granola breakfast bar made with commodity almond butter to the menu next year and a breadstick made with commodity cheese to supplement the department's spaghetti entree.

CHICAGO PUBLIC SCHOOLS

*1991 sales: $135.8MM†**
400 ranking: 158
Segment ranking: 3

John Costello, director, department of foodservices, and staff have been upgrading services, improving equipment and instituting a variety of cost controls. For example, the department has been studying the meals-per-labor-hour ratio to make sure it is operating as efficiently as possible and has cut back on staff where appropriate. The department also has added hot-meal service at 14 of the 22 schools that had only cold-pack lunches.

It's also pushing participation in both breakfast and lunch through promotions. Although the district has been serving breakfast since 1966, the goal is to increase participation to 100%. Breakfasts vary according to facilities and food-preparation stations in individual schools. New breakfast menus include orange juice, breakfast pizza and white milk, and chilled fruit juice, hot waffles with butter and syrup, turkey-ham and white milk.

During National Breakfast Week, held March 3 through 6 this year, one school participated in a soup-for-breakfast promotion. A sample menu included vegetable soup, toast, chilled peaches, cereal and milk. Parents were invited to join their children for breakfast at a cost of just 75 cents.

New breakfast menus and greater emphasis on nutrition help Chicago students stay focused on studies.

DADE COUNTY SCHOOLS

*1991 sales: $104.6MM†**
400 ranking: 190
Segment ranking: 4

To help improve the health of Florida children, the Dade County school system

continued on page 182

*Company estimate; †commercial equivalent

Thai will be the hot new food on college campuses next year.

continued from page 180

is testing a menu of low-fat, low-sugar, low-salt and high-fiber foods in seven schools. Dade County also is trying to increase revenue and customer satisfaction. For example, to increase dollars to the bottom line, a la carte offerings have been expanded in all 302 schools. Strategic changes planned for this year concern dealing with the state's austerity budget and further expanding the pilot nutrition/fitness program.

Michigan State University's strategy: Increased menu variety.

HOUSTON INDEPENDENT SCHOOL DISTRICT

*1991 sales: $64.1MM†**

400 ranking: 260

Segment ranking: 5

To make sure that foodservice is preparing foods that students actually want, this 232-serving-location district has ensured more customer involvement by implementing a volunteer committee participation program. The committee makes suggestions for menu and service changes. To increase sales, the department plans to implement more scatter systems in secondary schools.

PHILADELPHIA SCHOOL DISTRICT

*1991 sales: $56.1MM†**

400 ranking: 280

Segment ranking: 6

All eyes remain on Philadelphia, as it is one school district that has implemented a Universal Feeding Pilot Program. The most important change this district plans to make is further expansion of the breakfast program to all 144 of the district's serving locations.

MICHIGAN STATE UNIVERSITY

*1991 sales: $37.8MM†**

400 ranking: 364

Segment ranking: 11

Although lasagna is the most popular menu item on this East Lansing campus, Foodservice Coordinator Ted Smith says that students are becoming more interested in lighter foods. Stir-fries are in demand, he says, and he expects poultry dishes to become even more popular. Smith mentions that other international foods also will be showing up with increasing frequency on college menus, and he expects Thai food to be the next hot menu selection on college campuses across the nation. The overall emphasis? "More diversity, wider variety," Smith says. **—S.S.**

*Company estimate, †commercial equivalent

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Gulf War and Recession Hurt, but Fun Reigns Again in '92

The combined effect of the Persian Gulf War and the recession depressed overall attendance and profits at domestic theme parks, especially Florida's Walt Disney World, Busch Gardens and Sea World. But 1992 has already shown vast improvement as the fear of travel dissipates and people stop delaying vacations. The airline wars in late May will have an incredibly positive effect on 1992 attendance figures as well.

Cruise ships seem to have fared better, with Carnival reporting higher occupancies over 1991 and a 12.5% increase in total revenue—even with discounting. With more lines adding ships, revenue should continue to rise.

Good news for the segment: People will take long-delayed vacations.

400

On the food scene, nutrition is the buzzword—more fresh fruit, salad, fish and seafood, as well as low-calorie, low-fat entrees featuring chicken, lean beef and pork are joining menus. Much of the work toward more healthful foods occurs behind the scenes in kitchens and galleys, where herbs, wood-smoking, and herb-, fruit- and vegetable-infused oils add flavor instead of fat.

At Disney's Sci-Fi Theater, healthful comfort foods include turkey sloppy Joes and sandwiches on seven-grain bread.

WALT DISNEY WORLD CO.

*1991 sales: $531.0MM***

400 ranking: 47

Segment ranking: 1

Euro Disney opened April 12 with 30 attractions, 30 restaurants (several sporting distinctly American themes such as the Wild West) and 5,200 rooms in six hotels. By 1995, an MGM Studios theme park with attractions and movie- and TV-production facilities will be complete.

The commitment to nutrition is strong at Disney, Lake Buena Vista, Fla. Fresh-fruit sides have joined fries, the chili on the chili mac is vegetarian, and grilling is as popular as frying.

continued on page 186

**R&I estimate

RECREATION
$1.2 billion

1.1% of all 400 commercial sales

TOP TRENDS

- ☐ Healthful food: More grilled items, salad
- ☐ Value for the money: Recession-sensitive customers are willing to spend but the food better be good
- ☐ Comfort food—meatloaf, pot pie, chili mac—but with a more healthful twist: sides of fruit or cucumber salad
- ☐ More authentic, regional interpretations of ethnic foods
- ☐ Pan-smoking
- ☐ More herbs, spices, infused oils
- ☐ More themed restaurants: American West, Caribbean, South American

NEW MENU ITEMS

- ☐ Leiserv: Value deals (burger, sub, ham and cheese, etc., with fries and soft drink for $2.99)
- ☐ Disney: Dishes with reductions of vinegars and infused oils instead of heavy cream sauces
- ☐ Carnival Cruise Lines: Spa Selections—salad, entree and dessert with reduced sodium and calorie content

continued from page 185

Despite fast-food popularity, nutritious foods sell well.

CARNIVAL CRUISE LINES

*1991 sales: $135.4MM†***

400 ranking: 160

Segment ranking: 2

Passenger capacity increased 15%, mostly with the launch of the Miami-based fleet's newest ship, 2,600-passenger Ecstasy, in June 1991. Two more ships equal in size are scheduled for 1993 and 1994.

In November 1991, Carnival adopted a formal plan to sell its Crystal Palace Resort and Casino in the Bahamas. (It lost $33 million net in operations last year). The Gulf War and the recession are blamed for lower attendance and the division's subsequent poor profit showing.

Healthful foods still are in demand. "Spa Selections," which are lower in calories and sodium, include oven-roasted chicken with rosemary, and poached salmon fillet with dill butter.

BUSCH ENTERTAINMENT

1991 sales: $108.0MM

400 ranking: 186

Segment ranking: 4

A joint-venture agreement signed with a Spanish holding company and amusement-park operator, Tibidabo, means a new theme park and resort near Barcelona by 1995. The park, the largest in Southern Europe, will have a resort component modeled after the St. Louis-based company's Kingsmill Resort in Williamsburg, Va.

UNIVERSAL STUDIOS

1991 sales: $40.0MM

400 ranking: 351

Segment ranking: 9

At Universal Studios, Orlando, Fla., patrons are ordering more nutritious foods—salads, grilled kebabs, fruit plates—but officials point out that park visitors are on vacation, so burgers, hot dogs, fries and pizza always outsell other foods. Comfort foods are great sellers. Such items as chili, spaghetti, potato salad and lasagna are in demand for two reasons: They are familiar to a wide cross-section of people and they are made well, according to Executive Chef Steve Jayson. "People are willing to spend, but the food has to be a really good value for the buck." That's why his staff makes pizza with whole-milk mozzarella, house-made dough and fresh herbs, for example.

According to Jayson, the park is likely to add an American barbecue concept by next spring. —B.L.

**R&I estimate; †commercial equivalent

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Retailers March to Different Drummers but Same Up Beat

Price/value, light-healthful and kids' stuff set tempo for two-tiered segment.

400

With one exception, retailers fit neatly into two categories: the sturdy giants such as K Mart, Wal-Mart and Woolworth that capitalize on price/value menus and quick service, and the upscale department stores such as Dayton's, Hudson's and Nordstrom that captivate with stylish restaurants, boutique food bars and *au courant* carry-out. Straddling both worlds is Target Stores, which holds the line on prices while taking a high-profile food-court approach to foodservice.

K MART

1991 sales: $326.0MM

400 ranking: 72

Segment ranking: 2

The Little Caesars Pizza Station units in new and refurbished K marts enjoy strong sales and traffic, says Pat Beaupre, director, Eatery Express and Specialty Food Operations. About 200 of 400 projected in-store restaurants are open. Eatery Express (grilled sandwiches, soft drinks, snacks, fast-food favorites) replaces cafeterias and delis in new and remodeled units without Little Caesars operations.

Dessert sales were flat in '91; the Troy, Mich.-based chain attributes customers' tightened purse strings and renewed concern for health. K mart appealed to value-conscious customers with its Super Value Menu and to the health-conscious with salads, a grilled chicken sandwich and lower-sodium processed meats.

The Pizzeria is one of five Skyroom concepts at Dayton's, Minneapolis, where food is made to order.

WOOLWORTH

1991 sales: $140.0MM

400 ranking: 153

Segment ranking: 3

Woolworth, New York, reports success with regional variations on its standard menu. J.B. Smith, director of operations, cites as popular the vegetable platter in the Southeast and chicken-fried steak in Texas. Sales of chicken and seafood salad in

continued on page 192

RETAIL
$1.2 billion

1.0% of all
400 commercial sales

TOP TRENDS

- ☐ Meeting customers' price-sensitivity by holding the line on menu prices
- ☐ Sending price/value messages with special-price menu promos, free beverage refills, complimentary hot breads, samples of new items
- ☐ Looking for light: active search for menu items lower in calories, fat, sodium, cholesterol; chicken top choice
- ☐ Revamping kids' menus, revitalizing menu promos; theme of the year is ecology
- ☐ Resurgence of foodservice in department stores

BEST PROMOS

- ☐ K mart: Super Value Menu (selected soup, salad, sandwich, snacks and dessert items at 99 cents each)
- ☐ Woolworth: Chicken Catalina (with broccoli cheese sauce) dinner or sandwich
- ☐ Target: Kids for Saving the Earth Fun Meal (ecology-theme meal with beverage, choice of sandwich, fries and premium for $1.99)

Dayton Hudson's adds value with fresh-baked bread and free beverage refills.

continued from page 191
pita pockets are up. Dessert sales were slower than the previous year, despite low prices and large portions.

DAYTON HUDSON DEPARTMENT STORES

1991 sales: $95.0MM
400 ranking: 202
Segment ranking: 4

Dayton Hudson stores continue to dazzle shoppers by staying a step ahead of trends. Foodservice alerted housewares to juicers (now a hot-selling appliance) through fresh juice bars launched in spring 1992. Dayton's and Hudson's stores in the Minneapolis-based chain have food boutiques in the Marketplace retail sections, as well as a devoted following for the Marketplace Lites and a fanatical corps of dessert and candy customers.

Dayton Hudson does not plan to raise prices in 1992. Two restaurant programs are value-added: the fresh-baked bread program (complimentary to the table, no limits) and beverage program (free refills without asking for all nonalcoholic beverages, milk included).

TARGET

*1991 sales: $80.0MM**
400 ranking: 225
Segment ranking: 5

The Food Avenue food-court concept launched in fall 1990 is working as well in smaller units of 1,500 to 1,900 square feet as it did in the 3,800-square-foot pilot unit, says Al Hodges, director of food operations for the Minneapolis-based chain. The smaller units offer four food concepts (yogurt/snacks, pizza, grilled sandwiches, and salads/deli) in a cluster-type menu.

Hodges says Target foodservice is searching out new items for health-conscious customers. He cites the new turkey sandwich and several new salads and low-calorie dressings as examples.

—Nancy Ross Ryan

*Company estimate

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For information circle 84

R&I 400: INDEX

Organization (rank)	Page
A&W Hot Dogs (287)	45
A&W Restaurants (112)	38
Acapulco Restaurants (219)	44
Adam's Mark Hotels (283)	45
All Seasons Services (248)	44
American Medical Intl. (335)	48
AMTRAK (227)	44
Applebee's Neighborhood Grill & Bar (83)	33
ARA Services (7)	32
Arby's (19)	32
Arctic Circle (341)	48
Ark Restaurants (295)	45
Army & Air Force Exchange Service (41)	32
Arthur Treacher's (360)	49
Au Bon Pain (224)	44
Aztar (336)	48
Bain's Deli (378)	49
Bakers Square (86)	33
Bally Casino Resorts (121)	38
Baskin-Robbins (34)	32
Benihana (213)	44
Bennigan's (56)	33
Bertucci's Pizzeria (365)	49
Beverly Enterprises (102)	38
Big Boy (26)	32
Bill Knapp's (228)	44
Bill Miller Barbeque (300)	45
Black-eyed Pea (177)	41
Blimpie Subs & Salads (172)	41
Blue Ribbon Services (393)	49
Bob Evans Restaurants (64)	33
Bobby McGee's (342)	48
Bobby Rubino's (366)	49
Bojangles' (168)	41
Bombay Bicycle Club (318)	48
Bon Appétit Mgmt. Co. (373)	49
Bonanza (63)	33
The Boyd Group (239)	44
Braum's Ice Cream (134)	38
Bresler's Ice Cream (322)	48
Broward Co. Schools (313)	48
Brown Derby (231)	44
Brown's Chicken (204)	44
Burger King (2)	32
Busch Entertainment (186)	41
C.A. Muer (289)	45
Caesar's World (161)	41
California Dept. of Corrections (85)	33
California Dept. of Developmental Services (298)	45
California Dept. of Rehabilitation (195)	41
Calif. Pizza Kitchen (265)	45
Canteen (18)	32
Captain D's (60)	33
Carl's Jr. (39)	32
Carlos Murphy's (361)	49
Carnival Cruise Lines (160)	41
Carrow's (157)	41
Carvel (151)	41
Casa Olé Restaurants (337)	48
Casey's General Store (184)	41
Caterair International (27)	32
Central Park USA (343)	48
Charlie Brown's (340)	48
Chart House (145)	38
Checkers Drive-In (238)	44
Cheesecake Factory (398)	49
Chevys (247)	44
Chi-Chi's (57)	33
Chicago Public Schools (158)	41
Chick-fil-A (73)	33
Chili's Grill & Bar (46)	32
Choice Hotels (36)	32
Chuck E. Cheese (143)	38
Church's Chicken (51)	33
Cineplex Odeon (197)	41
Cinnabon (267)	45
Circle K (115)	38
Circus Circus (174)	41
Claim Jumper (359)	49
Club Corp. of America (140)	38
Concession Air (138)	38
Cooker Bar & Grille (353)	49
Country Kitchen (129)	38
Cracker Barrel (98)	33
Creative Rest. Mgmt. (376)	49
Cucos Restaurantes (390)	49
CVI Service Group (394)	49
D'Angelo Sandwich (215)	44
dáka (125)	38
Dade Co. Schools (190)	41
Dairy Queen (11)	32
Dallas Ind. Schools (329)	48
Damon's (232)	44
Darryl's (230)	44
Daughters of Charity (146)	38
David's Cookies (299)	45
Daylight Donut Shops (189)	41
Days Inns of America (78)	33
Dayton Hudson (202)	44
Del Taco (131)	38
Denny's (16)	32
Dept. of Veterans Affairs (91)	33
Detroit Public Schools (397)	49
Dobbs Houses (122)	38
Dobbs International (53)	33
Domino's Pizza (10)	32
Doral Hotels (317)	48
Doubletree Hotels (156)	41
Dunkin' Donuts (29)	32
Eat'n Park (199)	41
El Chico (183)	41
El Pollo Loco (127)	38
El Torito (65)	33
Elmer's Pancake House (388)	49
Embassy Suites (139)	38
Emro Marketing (233)	44
Entertainment One (301)	48
Evangelical Lutheran Good Samaritan Society (277)	45
Everything Yogurt (311)	48
Fairmont Hotels (259)	45
Fed. Bureau of Prisons (142)	38
Flik International (371)	49
Fla. Dept. of Corrections (176)	41
Flying J Travel Plazas (383)	49
Fosters Freeze (201)	44
Four Seasons Hotels (118)	38
Freshens Yogurt (385)	49
Friendly Ice Cream (48)	32
Fuddruckers (130)	38
Furr's Cafeterias (113)	38
Garcia's (203)	44
Gardner Merchant (12)	32
Godfather's Pizza (104)	38
Golden Corral (58)	33
Golden Nugget (208)	44
Grandy's (133)	38
Great American Chocolate Chip Cookie Co. (271)	45
Great Steak & Fry (399)	49
The Ground Round (84)	33
Guckenheimer (268)	45
Guest Quarters (362)	49
Guest Services (210)	44
Häagen-Dazs (162)	41
Hamburger Hamlets (290)	45
Happy Chef (368)	49
Hard Rock Cafe (141)	38
Hardee's (5)	32
Harrah's Casino Hotels (164)	41
Harry M. Stevens (126)	38
Hawaii Statewide School System (286)	45
HDS Services (205)	44
Health Care & Retirement Corp. (307)	48
Health Trust (229)	44
Hillsborough County (Fla.) School Board (332)	48
Hilton Hotels (23)	32
Holiday Inn Hotels (32)	32
Holland America Line (258)	45
Homestyle Buffet (303)	48
Hooters Restaurants (194)	41
Hospital Corp. of Amer. (149)	38
Houlihan's (124)	38
Houston Ind. Schools (260)	45
Houston's (191)	41
Howard Johnson (211)	44
Huddle House (240)	44
Humana (182)	41
Hungry Howie's (262)	45
Hungry Hunter (292)	45
Hyatt Hotels (22)	32
I Can't Believe It's Yogurt (209)	44
In-N-Out Burgers (334)	48
Inter-Continental Hotels (54)	33
Intl. House of Pancakes (61)	33
J.B.'s Restaurants (169)	41
Jack In The Box (31)	32
Jerry's Subs & Pizza (321)	48
K mart (72)	33
K&W Cafeterias (234)	44
Kettle Restaurants (178)	41
KFC (3)	32
King's Restaurants (346)	48
King's Table Buffets (217)	44
Krystal (117)	38
L&N Seafood (244)	44
Lackmann Food Service (296)	45
Lamp Post Pizza (372)	49
LaRosa's Pizzerias (312)	48
Lee's Famous Recipe (148)	38
Legal Sea Foods (305)	48
Leiserv (326)	48
Lettuce Entertain You (200)	41
Levy Restaurants (314)	48
Levy Concessions (281)	45
Life Care Center (304)	48
Little Caesars (14)	32
Loews Hotels (370)	49
Long John Silver's (43)	32
Longhorn Steaks (330)	48
Los Angeles Unified School District (97)	33
Luby's Cafeterias (71)	33
Lyon's Restaurants (170)	41
Magic Pan (325)	48
Maid-Rite (302)	48

Manchu Wok (235) 44
Manor Health Care (237) . . 44
Marie Callender (101) 38
Mark Pi's (396) 49
Marriott Lodging (25) 32
Marriott Mgmt. Services (9). . 32
Mazzio's (179) 41
McCrory Stores (324) 48
McDonald's (1) 32
MCL Cafeterias (309) 48
Miami Subs (354) 49
Michigan Dept. of Corrections (223) 44
Michigan State Univ. (364). . 49
Mister Donut (187) 41
Morrison's Cafeterias (80) . . 33
Morrison's Custom (38) . . . 32
Morton's Steakhouses (348). . 48
Mountain Jack's (278) . . . 45
Mountain Mike's (349) . . . 48
Mr. Gatti's (181) 41
Mr. Hero (331) 48
Mr. Steak (344) 48
Mrs. Fields (144) 38
Mrs. Winner's Chicken (241). . 44
Nathan's Famous (249) . . . 44
National Healthcorp (338) . . 48
National Medical Ent. (109). . 38
Navy Exchange (136) 38
New Jersey Dept. of Corrections (193) 41
New Jersey Dept. of Human Services (375) . . 49
New York City Board of Education (67) 33
New York City Health & Hospitals (257) 45
New York Rest. Group (339). . 48
New York State Dept. Correctional Services (180) . . . 41
New York State Office of Mental Health (242) . . . 44
New York State Office of Mental Retardation (274). . 45
Noble Roman's (377) 49
Nordstrom (253) 45
North Carolina Dept. of Corrections (323) 48
Northwest Airlines (400) . . . 49
Nutrition Mgmt. Svcs. (273). . 45
O'Charley's (275) 45
Ogden Services (50) 32
Ohio Dept. of Rehabilitation & Correction (282) 45
Old Country Buffet (120) . . 38
Old Spaghetti Factory (263). . 45
Olga's Kitchen (306) 48
The Olive Garden (35) 32
Omni Hotels (171) 41
Opryland Hotels (327) 48
Orange Julius (222) 44
Original Cookie Co. (264) . . 45
Original Seafood Shanty (387) . 49
Outback Steakhouse (206) . . 44
Palm Restaurants (357) . . . 49
Pancho's Buffet (226) 44
Papa Gino's (165) 41
The Pasta House (345) . . . 48
Peasant Restaurants (316) . . 48
Pennsylvania Dept. of Corrections (254) 45
Pennsylvania Dept. of Public Welfare (310) . . . 48
Pennsylvania State Univ. (381) . 49
Perkins (52) 33
Peter Piper (266) 45
Philadelphia Schools (280) . 45
Piccadilly Cafeterias (89) . . 33
Pietro's Pizza (386) 49
Pizza Hut (4) 32
Pizza Inns (132) 38
Pizzeria Uno (159) 41
PoFolks (152) 41
Ponderosa (37) 32
Popeyes (45) 32
Prime Motor Inns (369) . . . 49
Princess Hotels (216) 44
Professional Food-Service Management (198) 41
Pudgie's Chicken (350) . . . 48
Quincy's Steakhouses (86) . . 33
RA Restaurant Svcs. (284) . 45
RA Theme Rest. (279) . . . 45
Radisson Hotels (59) 33
Rally's Hamburgers (110) . . 38
Ramada Hotels (69) 33
Rax (111) 38
Red Lion (116) 38
Red Lobster (15) 32
Red Onion (297) 45
Red Robin (135) 38
Registry Hotel (272) 45
Resorts International (291) . 45
Restaura (95) 33
Restaurants Unlimited (250). . 44
Ritz-Carlton Hotels (119) . . 38
Round Table Pizza (75) . . . 33
Roy Rogers (103) 38
Royal Caribbean (167) . . . 41
Ruby Tuesday (99) 33
Rusty Pelican (392) 49
Ruth's Chris (251) 45
Ryan's Steak Houses (68) . . 33
Sanese Services (256) . . . 45
Sbarro (90) 33
Schlotzsky's (269) 45
Schwartz Brothers (395) . . 49
Seiler's/FDI (66) 33
Service America (33) 32
ServiceMaster (79) 33
7-Eleven (13) 32
Shakey's (105) 38
Shari's Restaurants (285) . . 45
Shells Restaurants (382) . . 49
Sheraton (17) 32
Shoney's (24) 32
ShowBiz Pizza (246) 44
Showboat (308) 48
Sir Pizza (328) 48
Sirloin Stockade (245) . . . 44
Six Flags (218) 44
Sizzler (30) 32
Skipper's (192) 41
Sky Chefs (55) 33
Skyline Chili (355) 49
Sonesta Hotels (347) . . . 48
Sonic Drive-Ins (49) 32
Sonny's Bar-B-Q (221) . . . 44
Soup Exchange (294) 45
Souplantation (384) 49
Southern Foodservice Mgmt. (293) 45
Specialty Restaurants (150). . 38
Spectrum Restaurants (333). . 48
Spire's Restaurants (379) . . 49
Sportservice (128) 38
Steak & Ale (114) 38
Steak 'n Shake (188) 41
Stouffer Hotels (106) 38
Stouffer Specialty Rest. (389) . 49
Stuart Anderson's (92) . . . 33
Subway Sandwiches (20) . . 32
Swensen's Ice Cream (320). . 48
T.G.I. Friday's (42) 32
T.J. Cinnamons (363) 49
Taco Bell (8) 32
Taco Bueno (261) 45
Taco John's (155) 41
Taco Time (196) 41
Target Stores (225) 44
Tastee-Freez (166) 41
TCBY (74) 33
Texas Dept. of Criminal Justice (255) 45
Texas Dept. of Mental Health (380) 49
Texas Health Ent. (315) . . . 48
Spaghetti Warehouse (288). . 45
Tippin's (358) 49
Togo's Eatery (252) 45
Tony Roma's (100) 33
Trader Vic's (276) 45
Trans World Airlines (163) . . 41
Trans/Pacific Rest. (212) . . 44
Trusthouse Forte (236) . . . 44
TS Restaurants (367) 49
Two Pesos (356) 49
U.S.A.F. Morale, Welfare, Rec. & Serv. Agency (81). . 33
U.S. Air Force Clubs (93) . . 33
U.S. Army Center of Excellence, Subsistence (21) 32
U.S. Army Community & Family Support (123) . . . 38
U.S. Army Medical (319) . . 48
U.S. Coast Guard (352) . . . 49
U.S. Marine Corps (87) . . . 33
U.S. Navy Food Service (28). . 32
U.S. Navy Club Sys. (107) . 38
United Airlines (44) 32
United Health (94) 33
Universal Ogden (147) . . . 38
Universal Studios Fla. (351). . 49
U.S.M.C. Morale (185) . . . 41
Valentino's (374) 49
Valley Mgmt. (220) 44
Veterans Canteen Svc. (270) . 45
Vie de France (391) 49
Village Inn (96) 33
Waffle House (77) 33
Wal-Mart Stores (70) 33
Walt Disney World Co. (47). . 32
Wawa (154) 41
Wendy's (6) 32
Western Sizzlin' (62) 33
Western Steer (173) 41
Westin Hotels (40) 32
Whataburger (76) 33
White Castle (82) 33
Wienerschnitzel (175) 41
Winchell's (214) 44
Wometco (207) 44
The Wood Co. (108) 38
Woolworth (153) 41
Wyatt's Cafeterias (137) . . 38
Wyndham Hotels (243) . . . 44